



Leads

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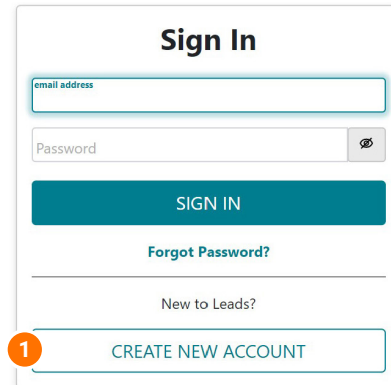
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CREATE A NEW ACCOUNT

Go to <https://leads.ecp123.com>.

- 1 Click **CREATE NEW ACCOUNT**. The Create Account window will display.



Sign In

email address

Password

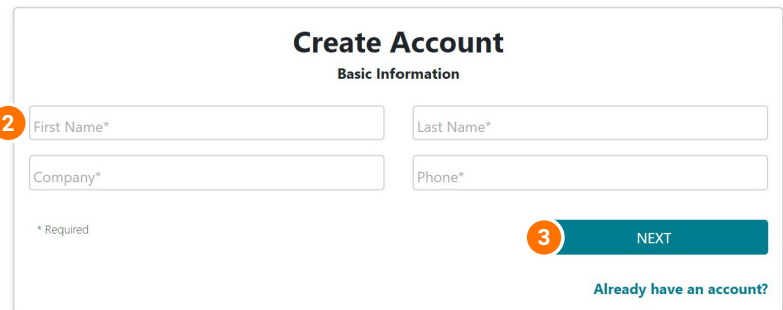
SIGN IN

[Forgot Password?](#)

[New to Leads?](#)

1 [CREATE NEW ACCOUNT](#)

- 2 Enter **First Name, Last Name, Company, and Phone** in the text fields.
- 3 Click **Next**.



Create Account
Basic Information

2 First Name*

Last Name*

Company*

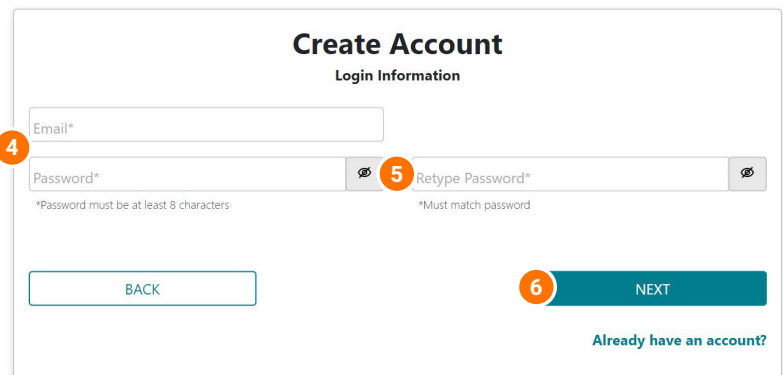
Phone*

* Required

3 **NEXT**

[Already have an account?](#)

- 4 Enter **Email Address** and a **Password**.
- 5 Re-enter the **Password**.
- 6 Click **Next**. The "Your Account is ready!" screen will display.



Create Account
Login Information

4 Email*

5 Password*

Retype Password*

*Password must be at least 8 characters

*Must match password

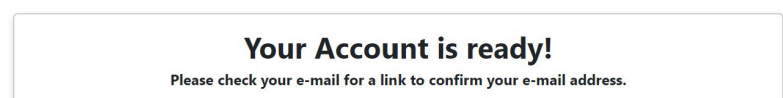
6 **NEXT**

[BACK](#)

[Already have an account?](#)

Check your email inbox for a link to confirm your email address.

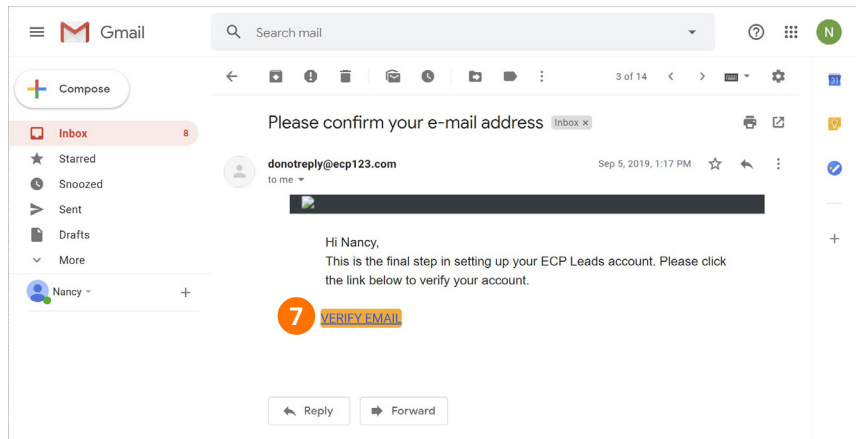
NOTE: If you don't see the email, check your junk folder.



Your Account is ready!

Please check your e-mail for a link to confirm your e-mail address.

- 7 Click **Verify Email** link. The Sign In window will display.



- 8 Enter your **Email Address**.
- 9 Enter your **Password**.
- 10 Click **SIGN IN**. The Leads page will display.

Sign In

8

9

10

SIGN IN

[Forgot Password?](#)

New to Leads?

CREATE NEW ACCOUNT



NAVIGATION

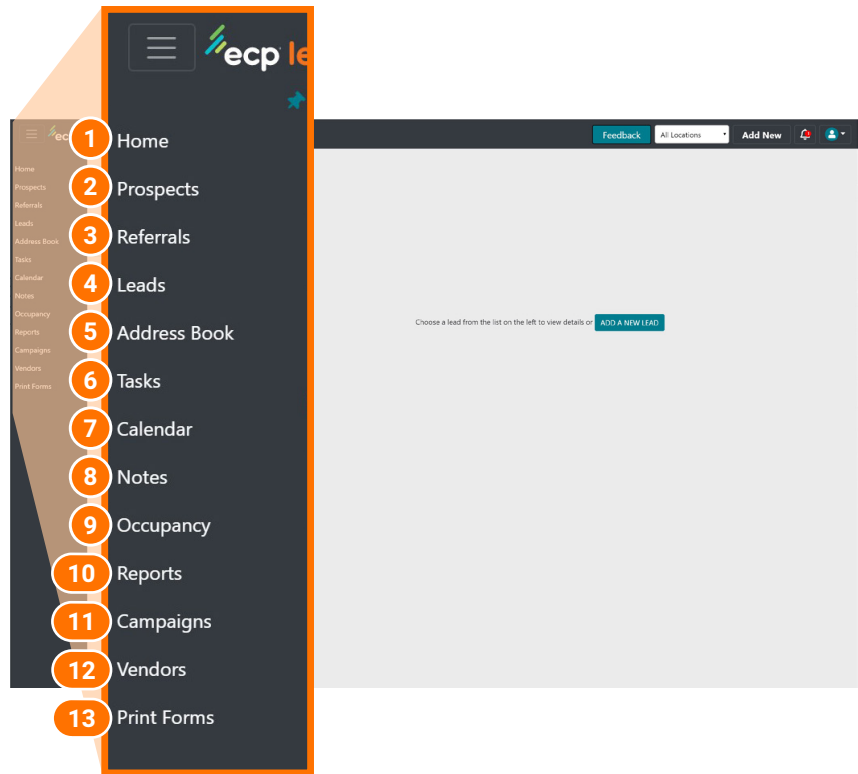
Hamburger

Click the ☰ (hamburger icon) to expand the menu. Tap again to show only icons.

Tap the 📌 (Pin icon) to keep the menu expanded.

- 1 Home***
Home screen.
- 2 Prospects**
List of Prospects.
- 3 Referrals**
People that have referred potential residents to you.
- 4 Leads**
Lists of potential residents that you have not yet made contact with.
- 5 Address Book***
List of contacts.
- 6 Tasks**
List of tasks.
- 7 Calendar**
View scheduled appointments for leads and Prospects.
- 8 Notes***
Coming soon.
- 9 Occupancy***
Coming soon.
- 10 Reports***
Coming soon.
- 11 Campaigns**
List of marketing programs.
- 12 Vendors***
Coming soon.
- 13 Print Forms***
Coming soon.

*Not available for beta test.

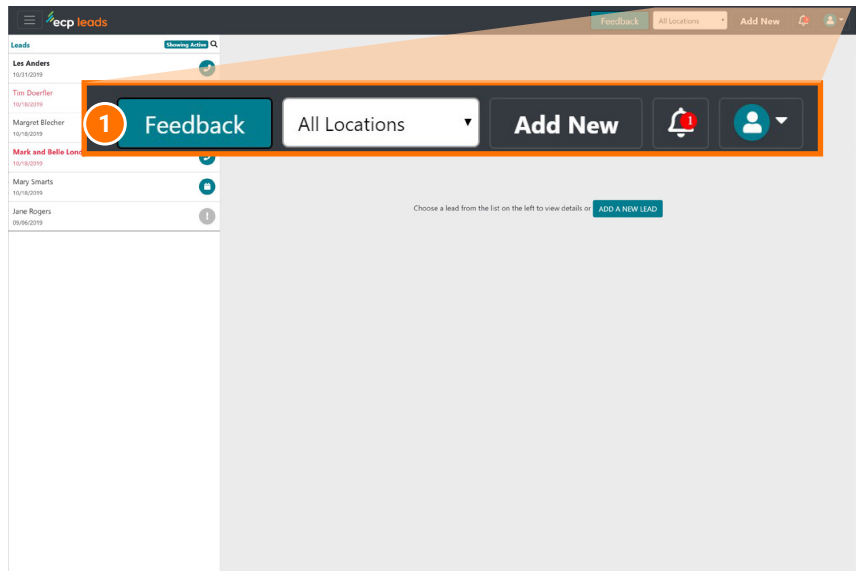


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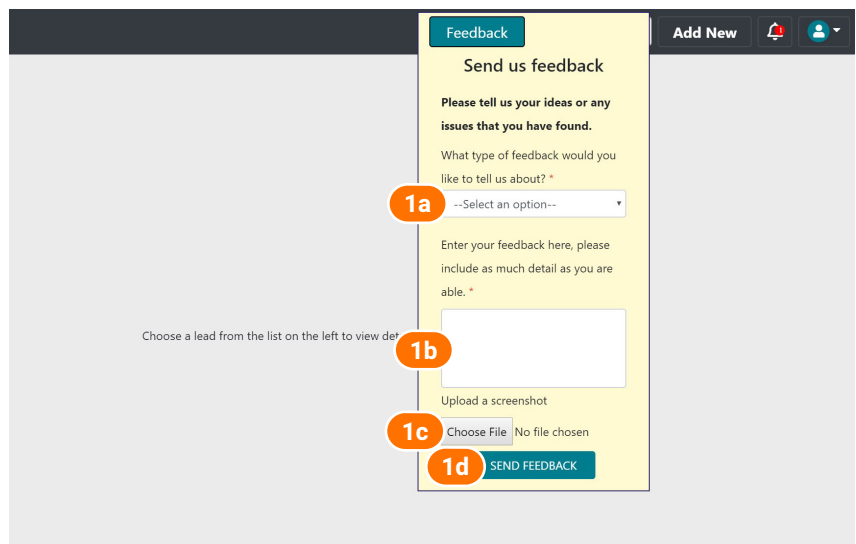
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Top Navigation

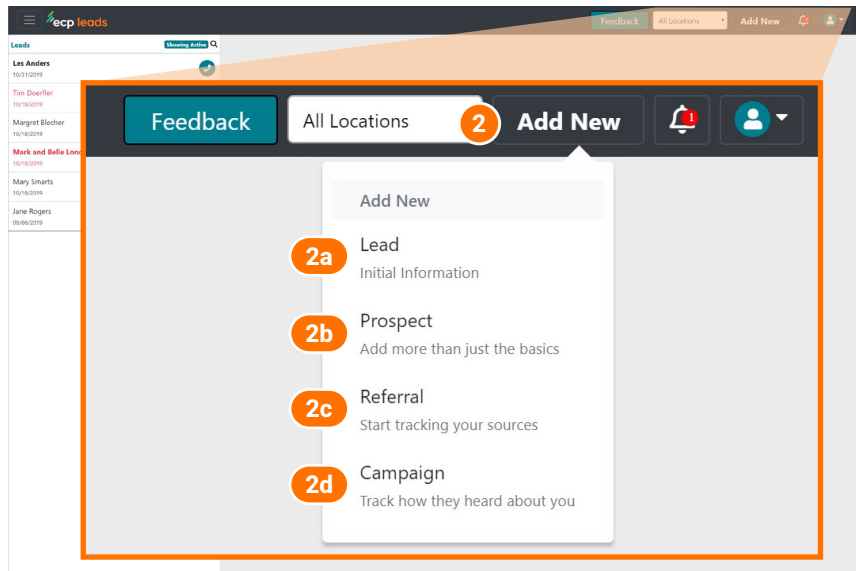
- 1 Feedback**
Click **Feedback** to send details of a problem or suggestion to ECP.



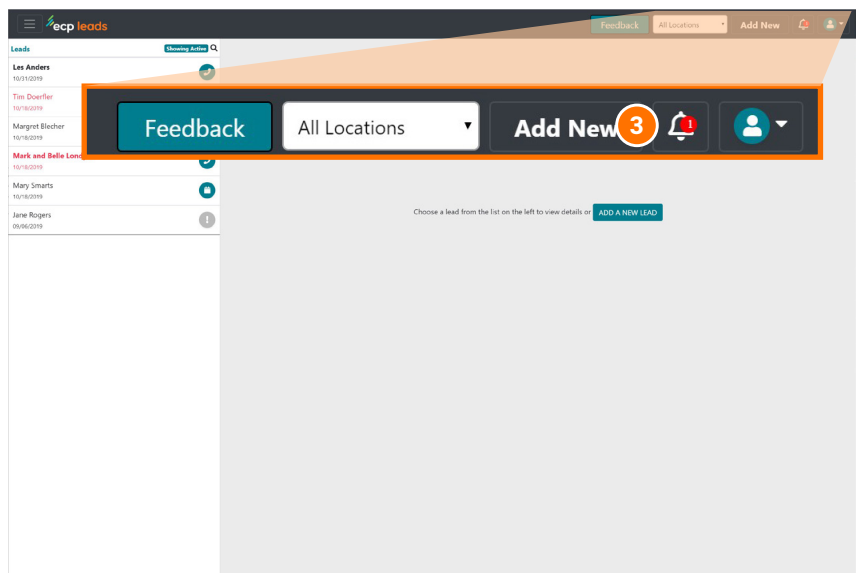
- 1a** Select an **Option** (Problem or Suggestion) from the dropdown list.
- 1b** Enter **Details** in the paragraph field.
- 1c** Click **Choose File** to upload a screenshot.
- 1d** Click **Send Feedback**.



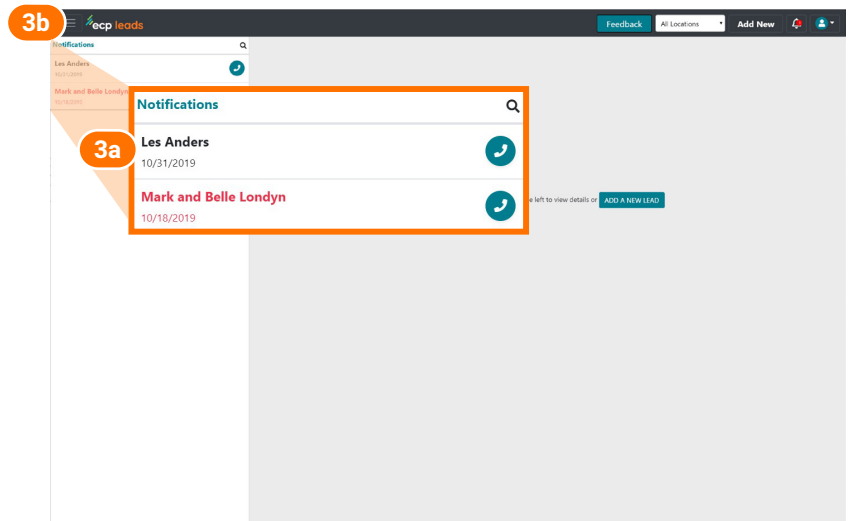
- 2 Add New.**
Click **Add New**. The Add New Menu will display.
- 2a** Click **Lead** to add a new Lead.
 - 2b** Click **Prospect** to add a new Prospect.
 - 2c** Click **Referral** to add a new Referral.
 - 2d** Click **Campaign** to add a new Campaign.



- 3 Notifications.**
The  (Notifications icon) shows the number of new Leads. Click the icon to view the new Leads.



- 3a** The Notifications list will show only new Leads.
- 3b** Click **Leads** from the Hamburger menu to view all the Leads in the list.

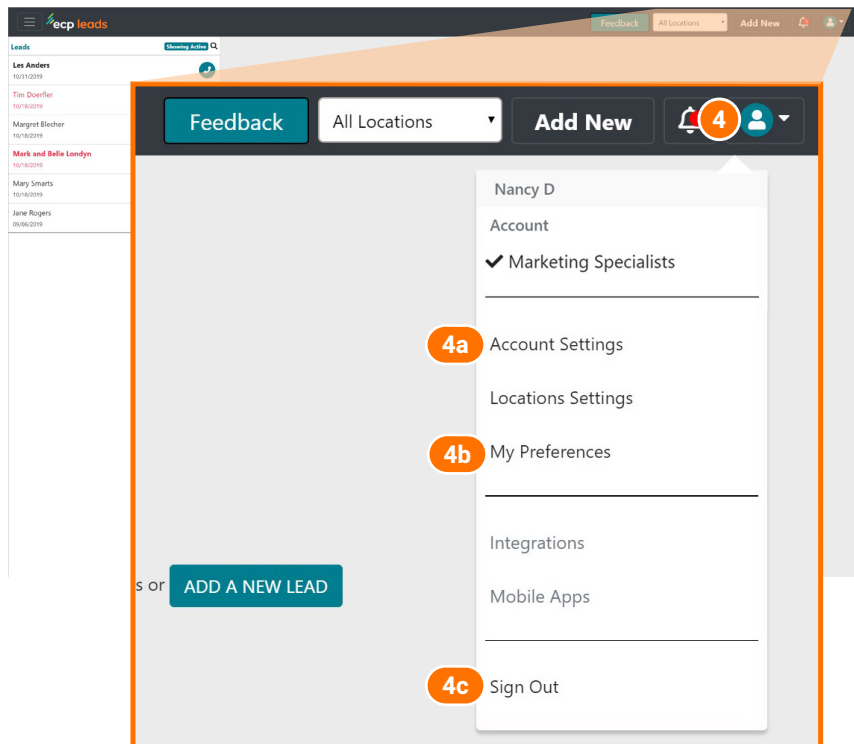


- 4** **User Menu.**
Click the  (User icon). The User Menu will display.

- 4a** Click **Account Settings** to edit account details.

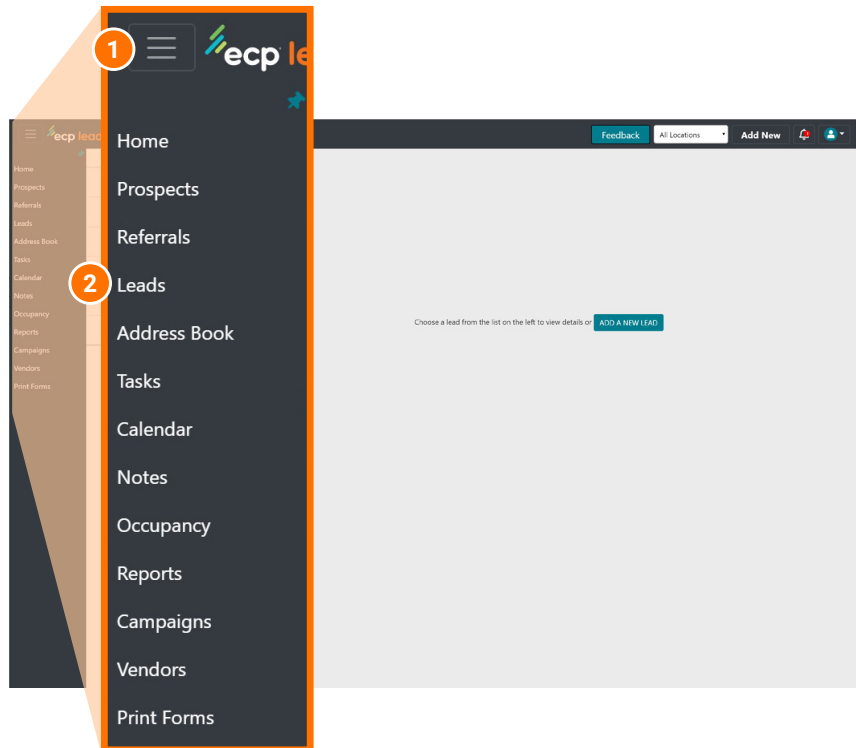
- 4b** Click **My Preferences** to edit your personal info or change your password.

- 4c** Click **Sign Out** to sign out of the program.



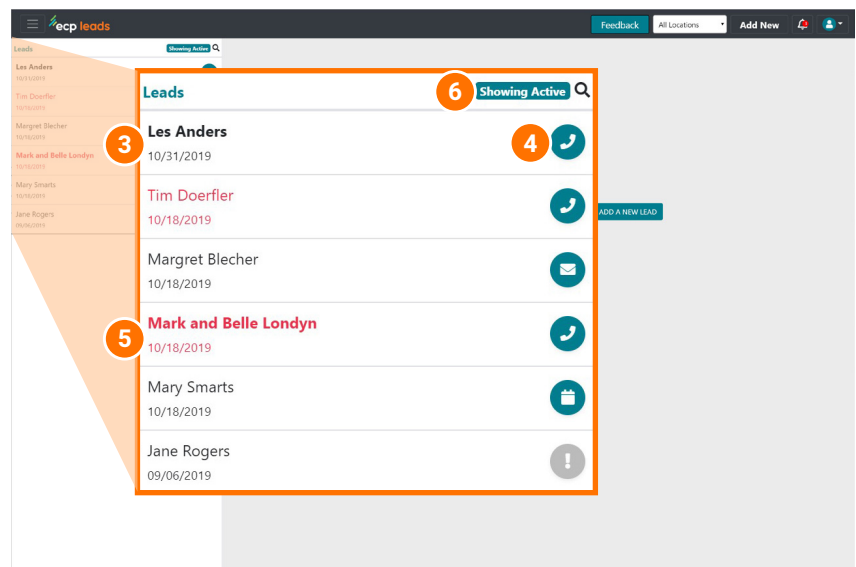
LEADS

- 1 Click the ☰ (hamburger icon). The hamburger menu will display.
- 2 Click **Leads**. The Leads list will display.

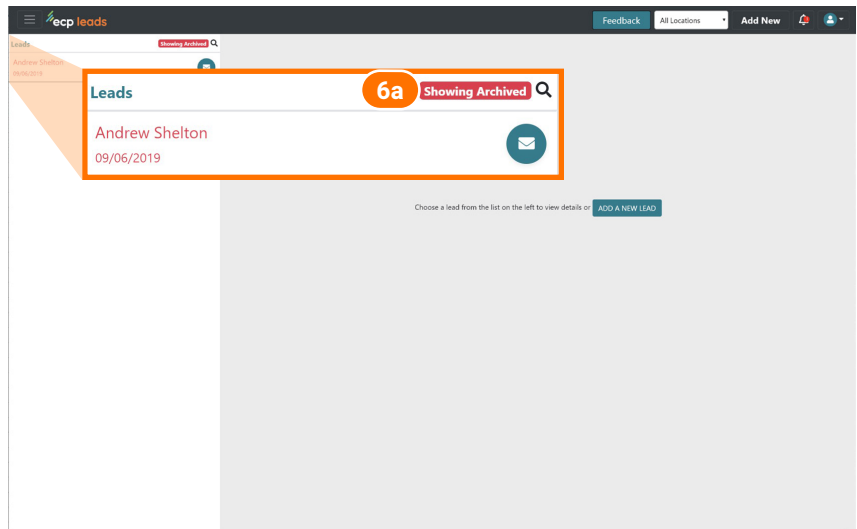


Leads List Navigation

- 3 **New Leads** display in bold with newest ones at the top.
- 4 **Action icons** indicate the upcoming task assigned to that Lead. Click the icon to complete that task.
 -  **(Phone icon):** Call is upcoming
 -  **(Email icon):** Email is upcoming
 -  **Calendar:** Appointment is upcoming
 -  **Exclamation:** Leads without an Appointment or a Task
- 5 **Overdue Tasks** display in red.
- 6 Active Leads display by default. Click **Showing Active** to view Archived Leads.



6a Click **Showing Archived** to return to the active Leads list.



Lead Details Navigation

- 1 Click a **Lead Name** to bring up the details.
- 2 Click the  (Phone icon) to log and complete a call to the Lead. This will create and complete a new Task.
- 3 Click the  (Email icon) to log and send an email to the Lead. This will create and complete a new Task.
- 4 Click the  (Edit icon) to edit Lead details.

Appointments

- 5 Click the  (Plus sign) to schedule an Appointment.

Tasks

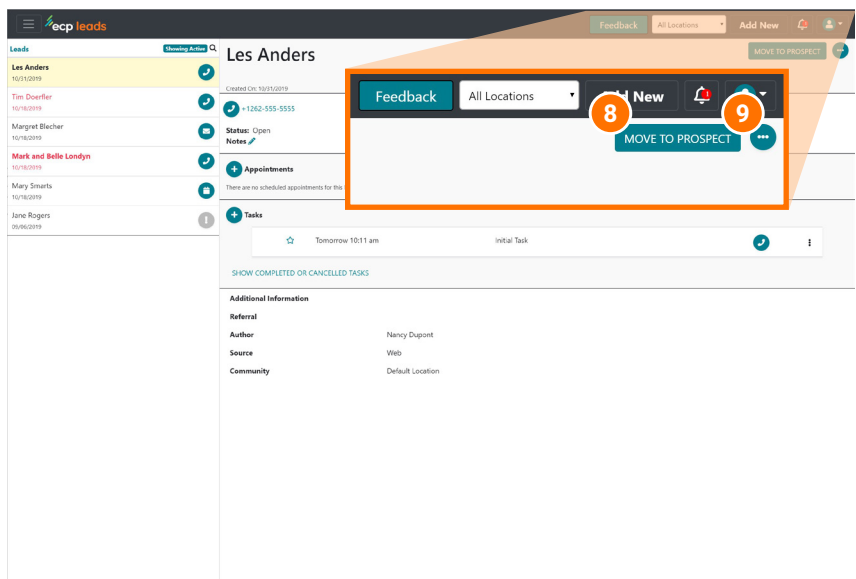
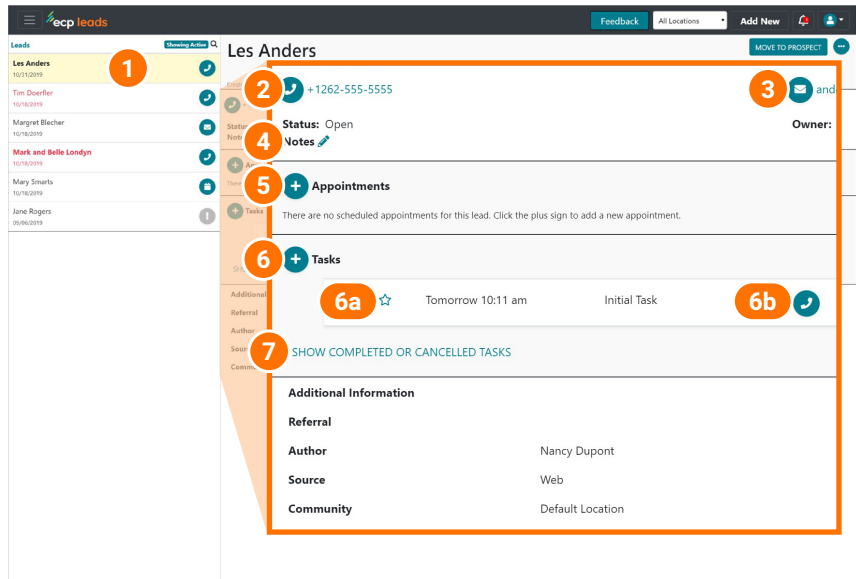
- 6 Click the  (Plus sign) to schedule a Task.
 - 6a An **Initial Task** of phone call is automatically created for new Leads.
 - 6b Click the  (Phone icon) to complete this task.
- 7 Click **Show Completed or Cancelled Tasks** to view those lists.

Move to Prospect

- 8 Click **Move to Prospect** to move the Lead to the Prospects page. See page 32.

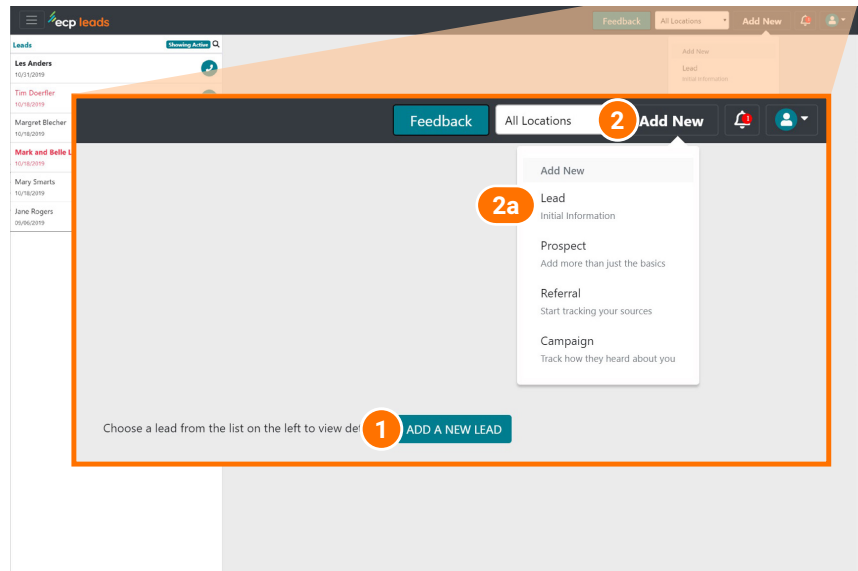
More Menu

- 9 Click the  (More menu) for more options.
Edit Details: See page 18.
Call: See page 15.
Email: See page 16.
Log Work Entry: See page 29.
Archive: See page 30.
Delete: See page 31.

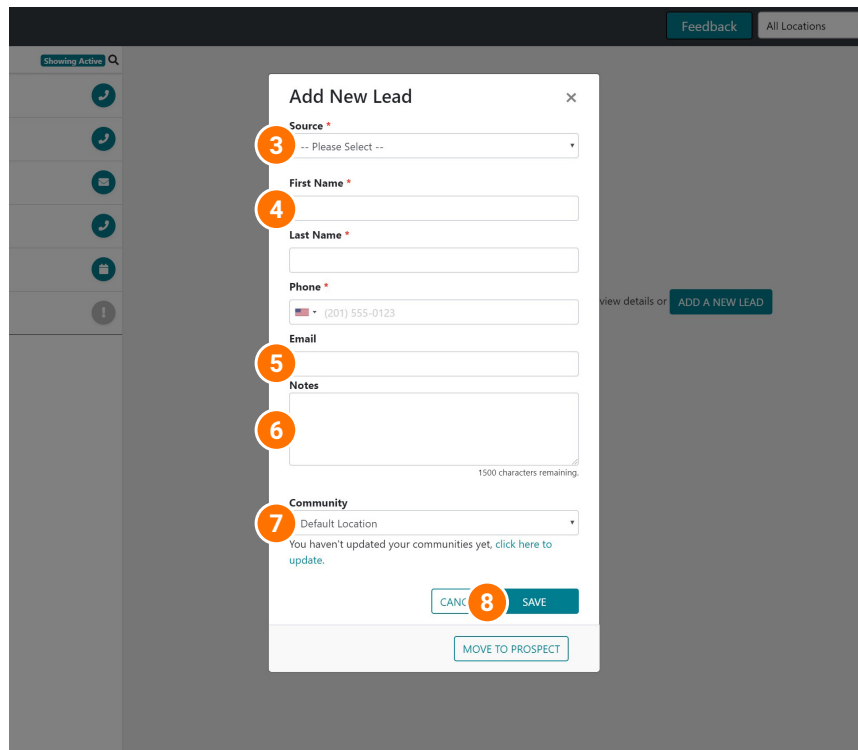


Add a New Lead

- 1 Click **Add A New Lead**.
- or
- 2 Click **Add New** from the Top Nav. The Add New menu will display.
- 2a Select **Lead**. The Add a New Lead pop-up window will display.

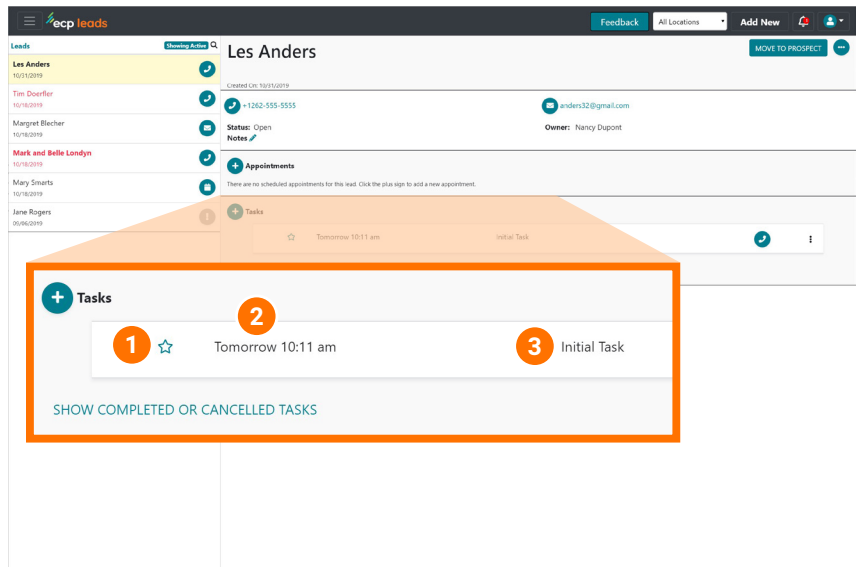


- 3 Select the **Source** from the dropdown list.
- 4 Enter the **First Name**, **Last Name**, and **Phone** in the text fields. These are required.
- 5 Enter the **Email** in the text field.
- 6 Enter **Notes** in the paragraph field.
- 7 Select the **Community** from the dropdown list.
- 8 Click **Save**. The Lead will be added to the list and Lead details window will display.

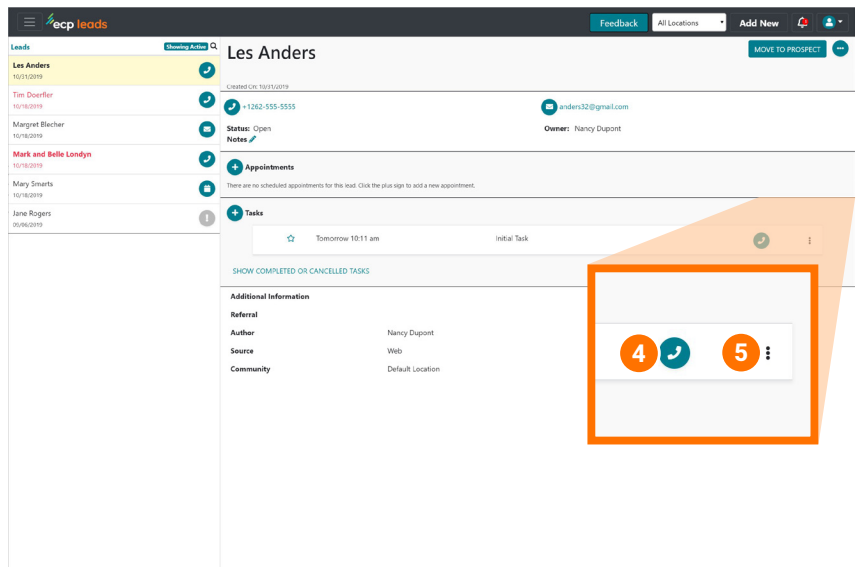


Task Navigation

- 1 **Favorite:** Click the ☆ (Star icon) to make this a favorite task. It will be pinned to the top of the Task list.
- 2 **Due Date and Time**
- 3 **Title**

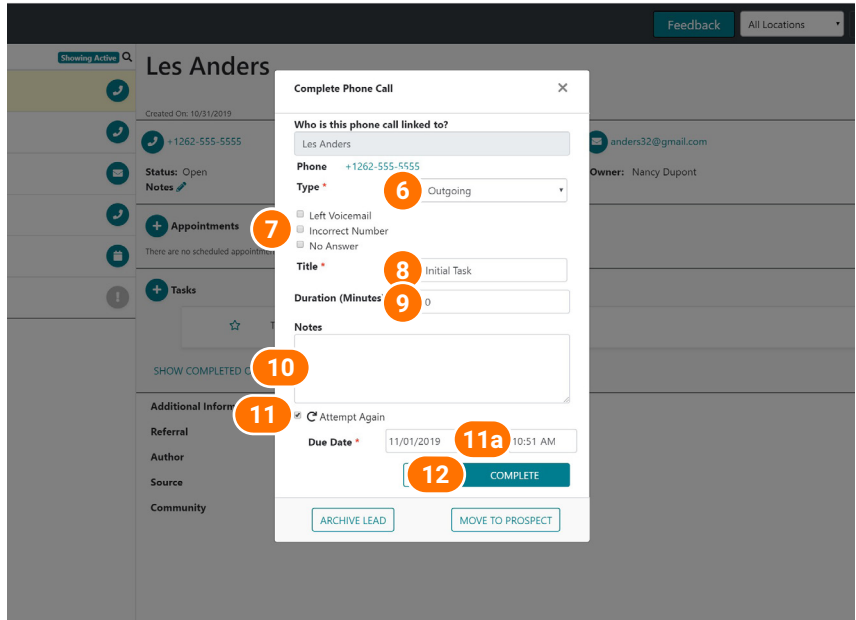


- 4 **Action Icon.** Click the ☎ (Phone icon) to complete and log the phone call. The Complete Phone Call pop-up window will display. See Step 6 below.
- 5 **More Menu:**
View: See page 26.
Edit: See page 26.
Complete: See page 27.
Cancel: See page 27.
Delete: See page 28.

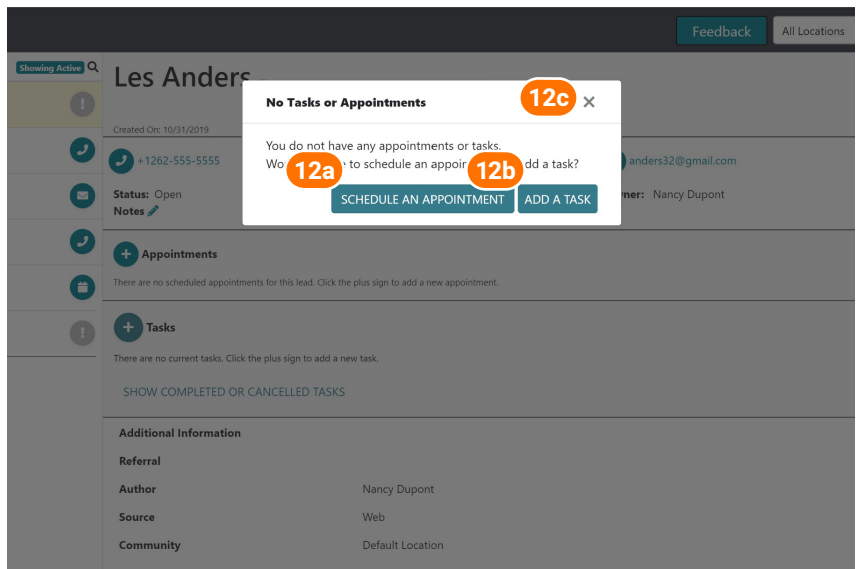


Complete Initial Task

- 6 Select **Outgoing** from the **Type** dropdown list.
- 7 Click a **Checkbox** to mark a reason if contact was not made (Left Voicemail, Incorrect Number, No Answer).
- 8 The default **Title** will be Initial Task.
- 9 Enter **Duration** (in minutes) of the phone call in the text field.
- 10 Enter **Notes** in the paragraph field.
- 11 Click the checkbox to **Attempt Again**. The Due Date and Time fields will display.
 - 11a Enter the **Due Date** and **Time** for the next attempt.
- 12 Click **Complete**. The Task will move to the Completed list. The No Tasks or Appointments pop-up window will display.

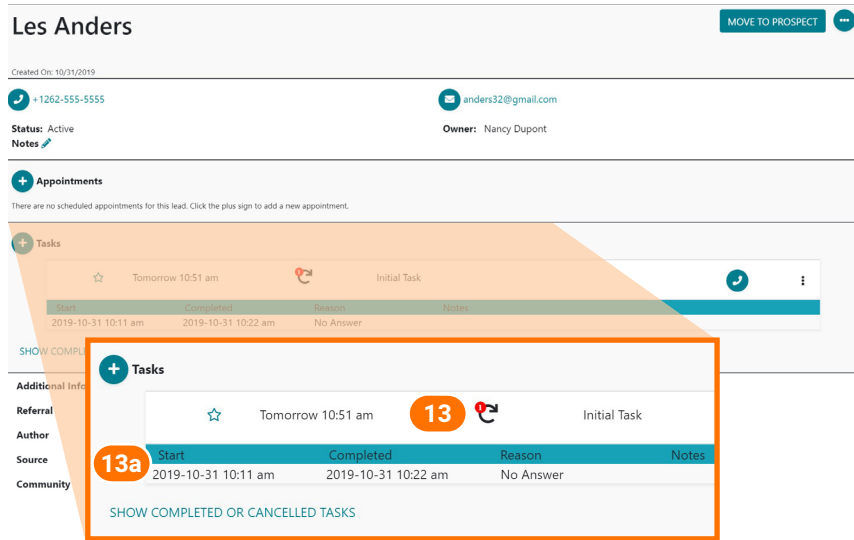


- 12a Click **Schedule An Appointment**. The Add Appointment pop-up window will display.
- or
- 12b Click **Add a Task**. The Add A Task pop-up window will display.
 - 12c Click the **X** to close the window without scheduling any additional tasks.




Attempt Again Task

- 13** Tasks that have been attempted at least once and were marked to attempt again will display with the  (Attempt again icon). The number of attempts will be indicated in the red circle. Click the icon to view the attempts log.
- 13a** The log of previous attempts will display **Start Day and Time, Completed Day and Time, Reason, and Notes**.



Les Anders MOVE TO PROSPECT

Created On: 10/31/2019

+1262-555-5555 anderson32@gmail.com

Status: Active Owner: Nancy Dupont

Appointments

There are no scheduled appointments for this lead. Click the plus sign to add a new appointment.

Tasks

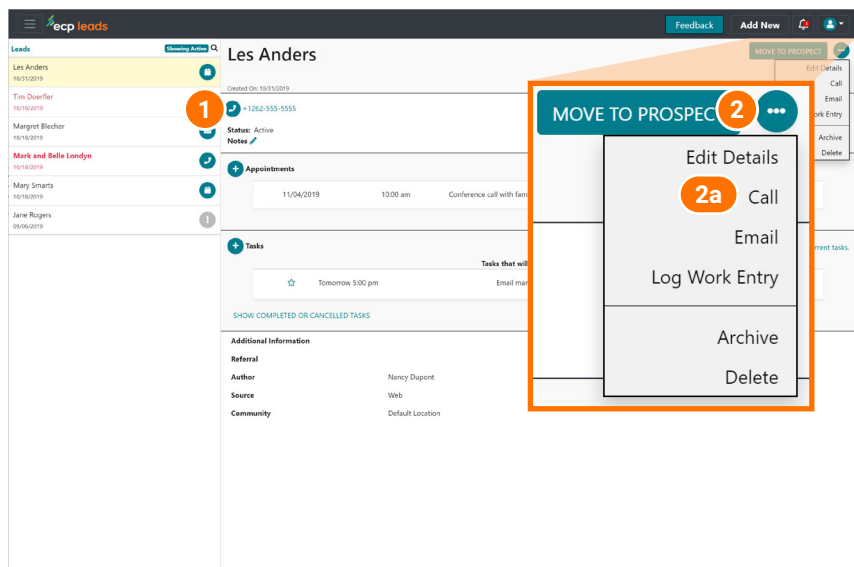
Tomorrow 10:51 am Initial Task

Start	Completed	Reason	Notes
2019-10-31 10:11 am	2019-10-31 10:22 am	No Answer	

SHOW COMPLETED OR CANCELLED TASKS

Call a Lead/Log a Previous Call

- 1** Click the  (Phone icon).
- 2** Click the  (More menu). The More menu will display.
- 2a** Select **Call**. The Complete Phone Call pop-up window will display.



Les Anders MOVE TO PROSPECT

Created On: 10/31/2019

Status: Active

Appointments

11/04/2019 10:00 am Conference call with family

Tasks

Tomorrow 5:00 pm Email message

SHOW COMPLETED OR CANCELLED TASKS

Additional Information

Referral: Nancy Dupont

Author: Web

Source: Default Location

Community: Default Location

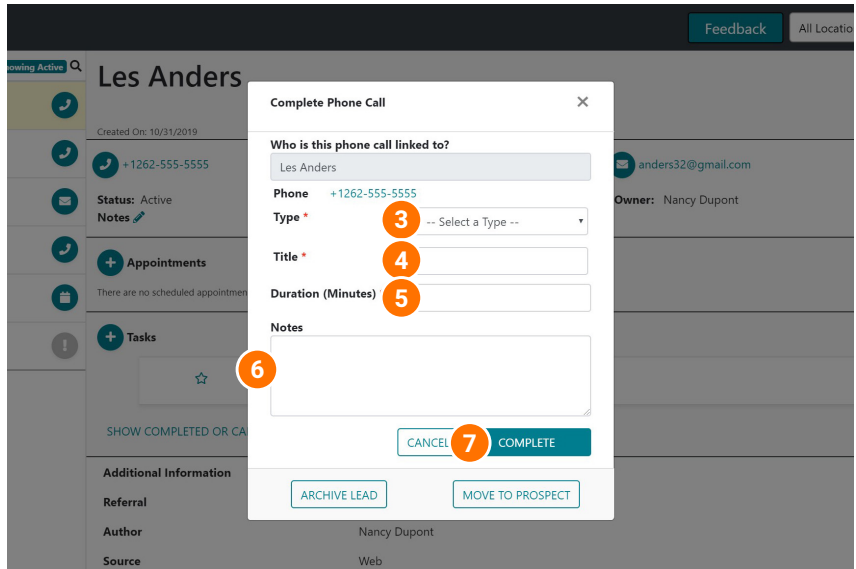
More Menu:

- Edit Details
- 2a Call**
- Email
- Log Work Entry
- Archive
- Delete



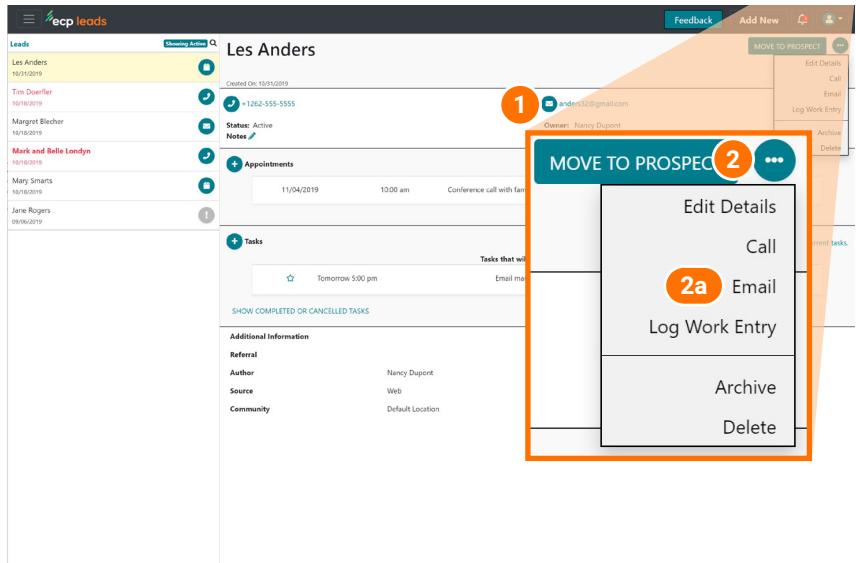
- 3 Select **Type** (Incoming, Outgoing) from the dropdown list.
NOTE: If Outgoing is selected, a **Checkbox** for Attempt Again will display. If this box is checked, Due Date fields will display. Enter a Date and Time to schedule another attempt.
- 4 Enter a **Title** in the text field.
- 5 Enter **Duration** (in minutes) of the phone call in the text field.
- 6 Enter **Notes** in the paragraph field.
- 7 Click **Complete**.

TIP: To archive a Lead or move to Prospect, see pages 30-33.



Email a Lead/Log a Previous Email

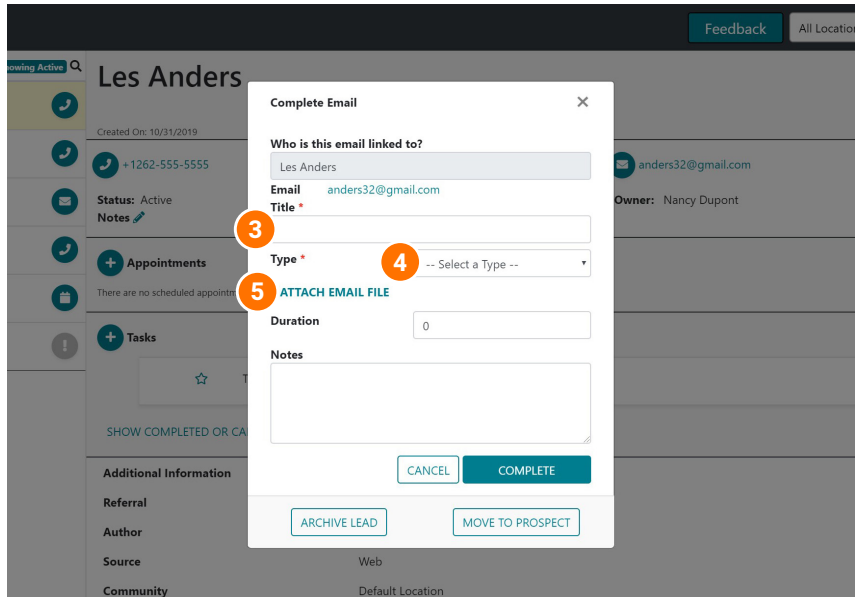
- 1 Click the  (Email icon).
- or
- 2 Click the  (More menu). The More menu will display.
- 2a Select **Email**. The Complete Email pop-up window will display.




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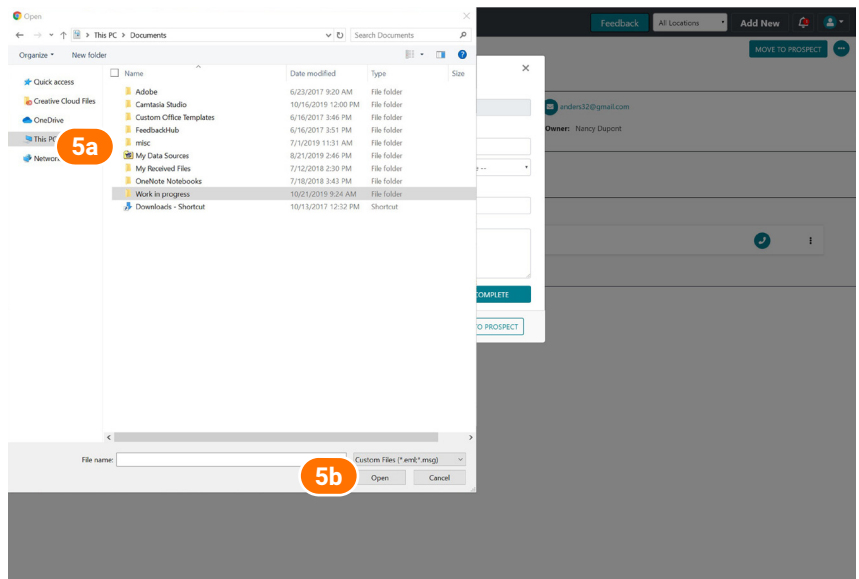
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- 3 Enter a **Title** in the text field.
- 4 Select **Type** (Incoming, Outgoing) from the dropdown list.
NOTE: If Outgoing is selected, you will have the option to mark this as an incorrect email.
- 5 Click **Attach Email File** to attach a file to the email. A file explorer window will display.



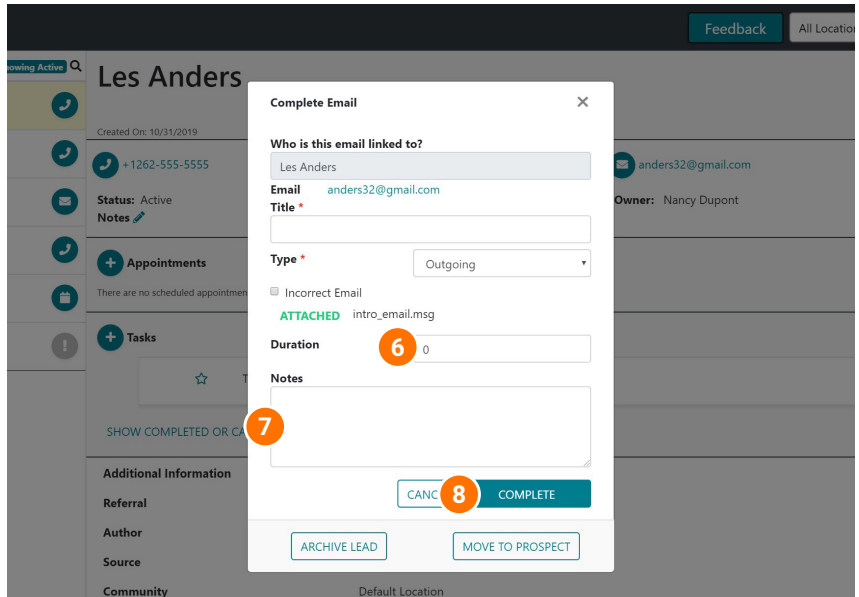
- 5a Navigate to the file on your computer.

- 5b Click **Open**.



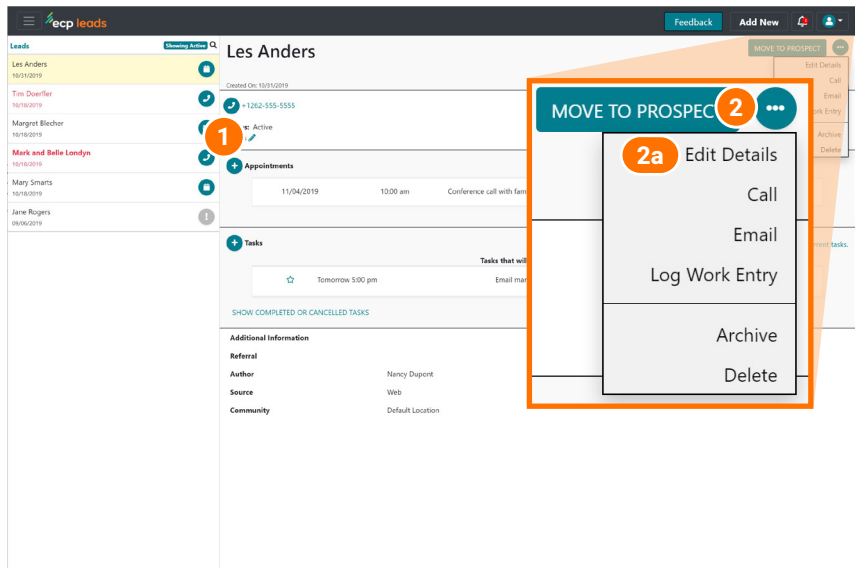
- 6 Enter **Duration** (in minutes) in the text field.
- 7 Enter **Notes** in the paragraph field.
- 8 Click **Complete**.

TIP: To archive a Lead or move to Prospect, see pages 30-33.



Edit Lead Details

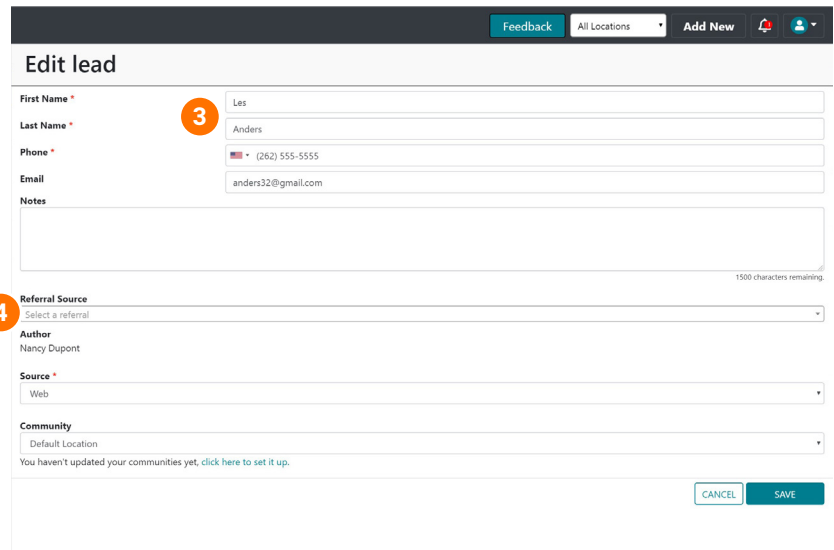
- 1 Click an  (Edit icon).
- or
- 2 Click the  (More menu). The More menu will display
- 2a Select **Edit Details**. The Edit Lead window will display.



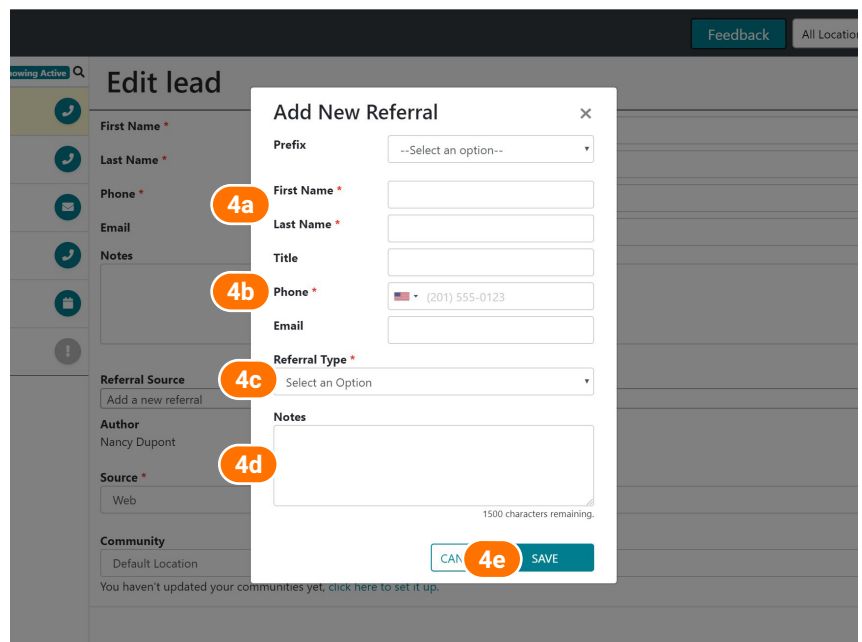

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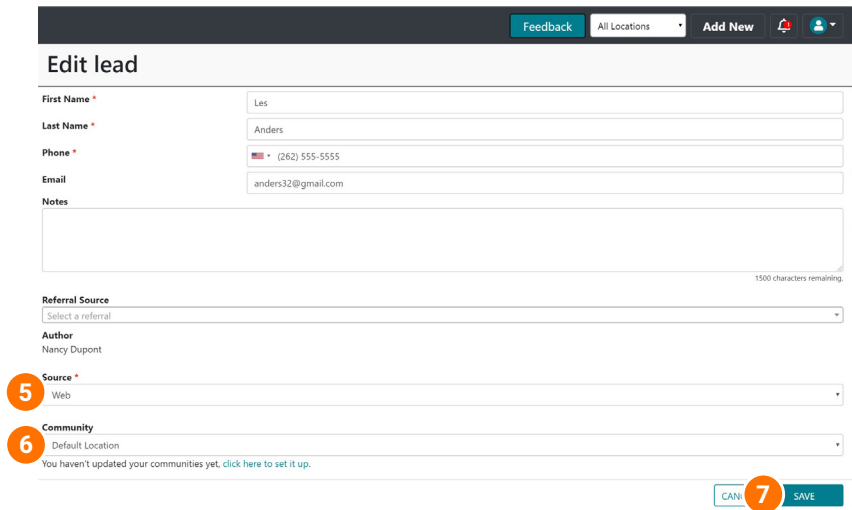
- 3 Click any **text** or **paragraph** field to edit or add an entry (First Name, Last Name, Phone, Email, Notes).
NOTE: This is a continuous log. If you delete a previous entry, it will be permanently deleted.
- 4 Select a **Referral source** from the dropdown list or select **Add New Referral** to add a new one. The Add a New Referral pop-up window will display.



- 4a Enter **First Name** and **Last Name** in the text fields.
- 4b Enter **Phone** number in the text field.
- 4c Select **Referral Type** from the dropdown list.
- 4d Enter **Notes** in the paragraph field.
- 4e Click **Save**.

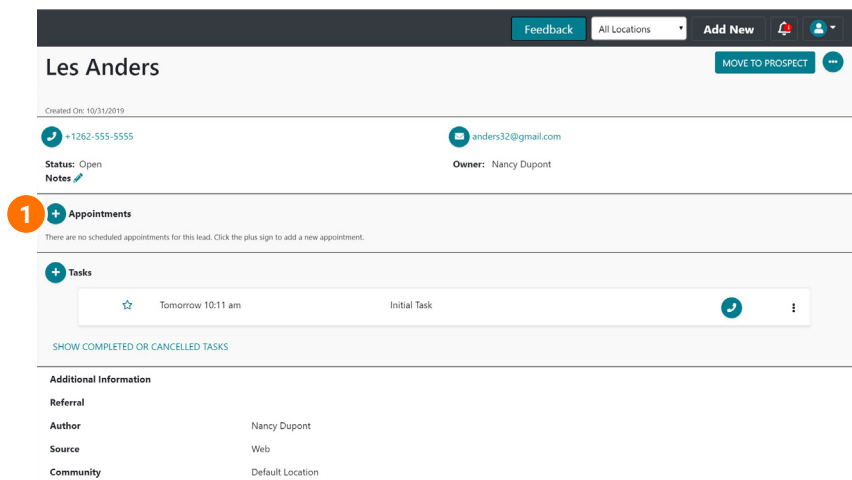



- 5 **Source** will autofill with the selection you made when the Lead was added. To change the source, select a different one from the dropdown list.
- 6 **Community** will autofill with the selection you made when the Lead was added. To change the community, select a different one from the dropdown list.
- 7 Click **Save**.



Add An Appointment

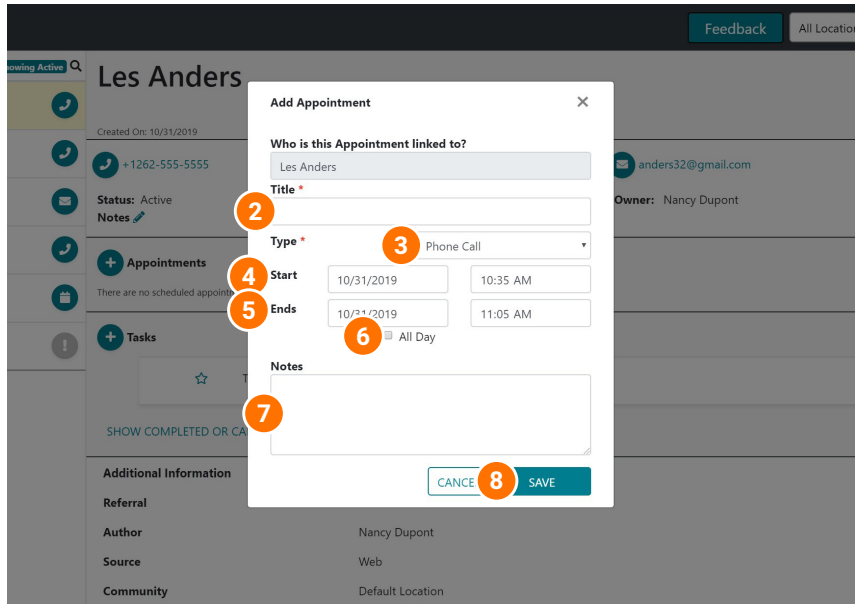
- 1 Click the **+** (Plus sign). The Add Appointment pop-up window will display.



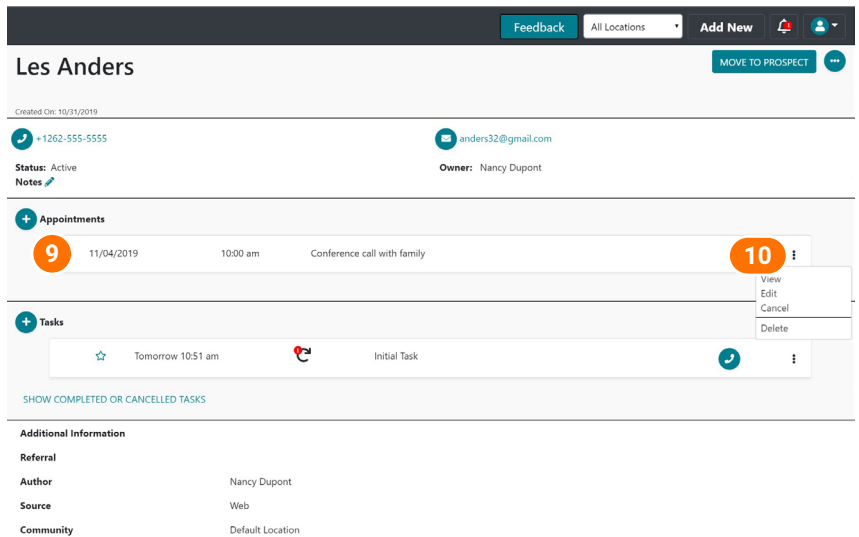

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- 2 Enter a **Title** in the text field.
- 3 **Type** can only be a phone call on a Lead.
- 4 Enter **Start Date** and **Time**.
- 5 Enter **End Date** and **Time**.
- 6 Click the **Checkbox** for All Day if applicable.
- 7 Enter **Notes** in the paragraph field.
- 8 Click **Save**.



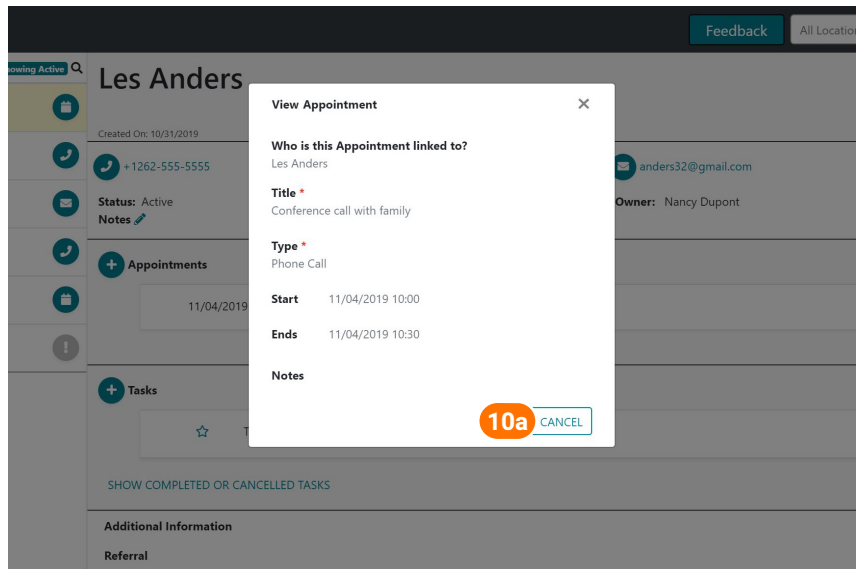
- 9 The new Appointment will display in the Appointments list.
- 10 Click the **More menu** (three dots) for more options (**View**, **Edit**, **Cancel**, **Delete**).




View Appointment Details

Select **View** from the More menu. The View appointment pop-up window will display. **NOTE:** Editing is not available in this window.

- 10a** Click **Cancel** or click the **X** to close the window.

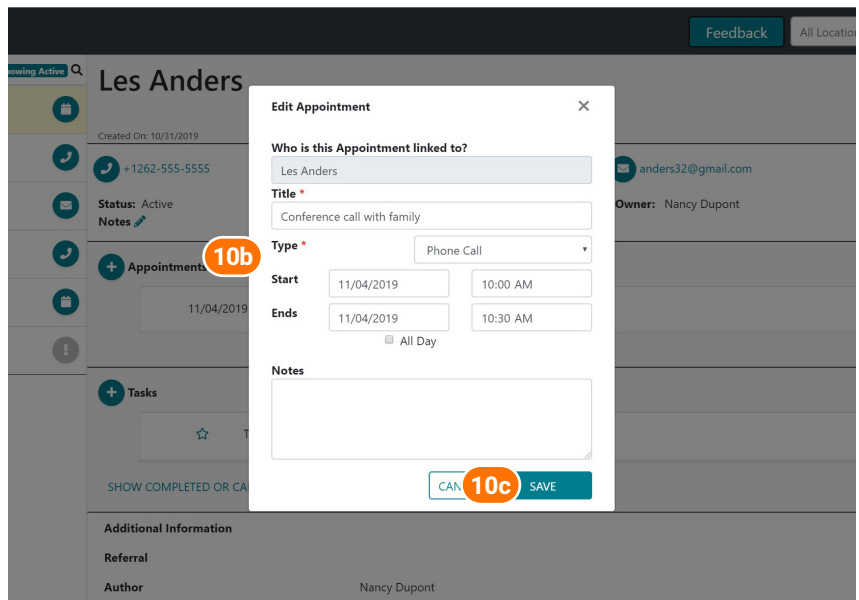


Edit an Appointment

Select **Edit** from the More menu. The Edit Appointment pop-up window will display.

- 10b** Edit appointment details (**Title, Type, Start, Ends, Notes**).

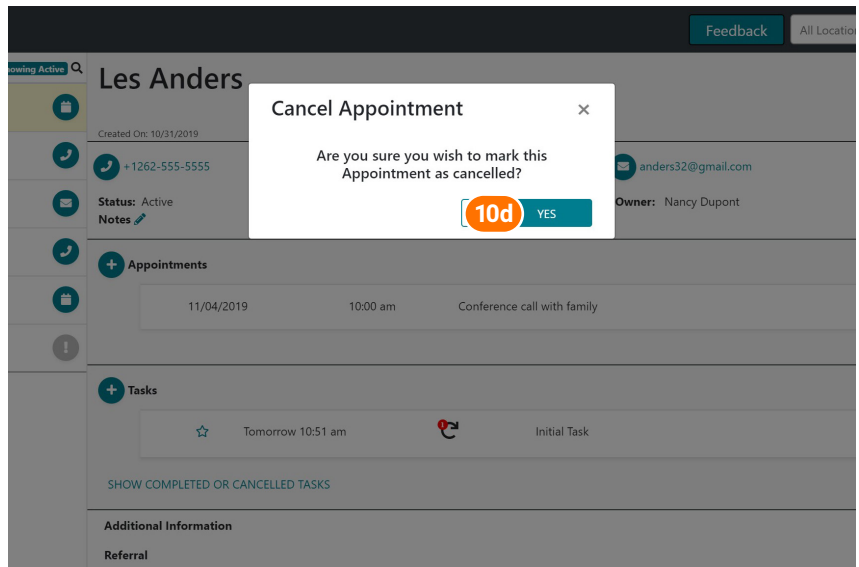
- 10c** Click **Save**.



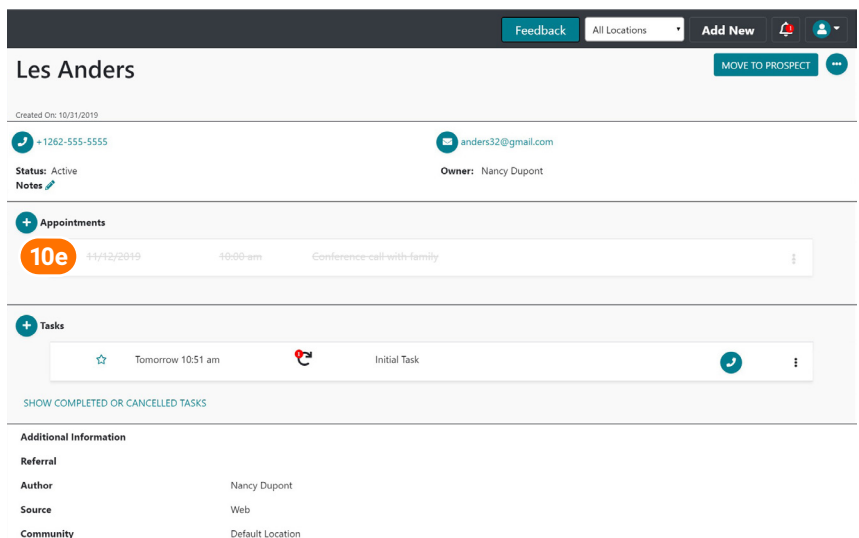
Cancel an Appointment

Select **Cancel** from the More menu. The Cancel Appointment pop-up window will display.

10d Click **Yes** to cancel.



10e The appointment will display in the list but with strikethrough indicating it was cancelled.



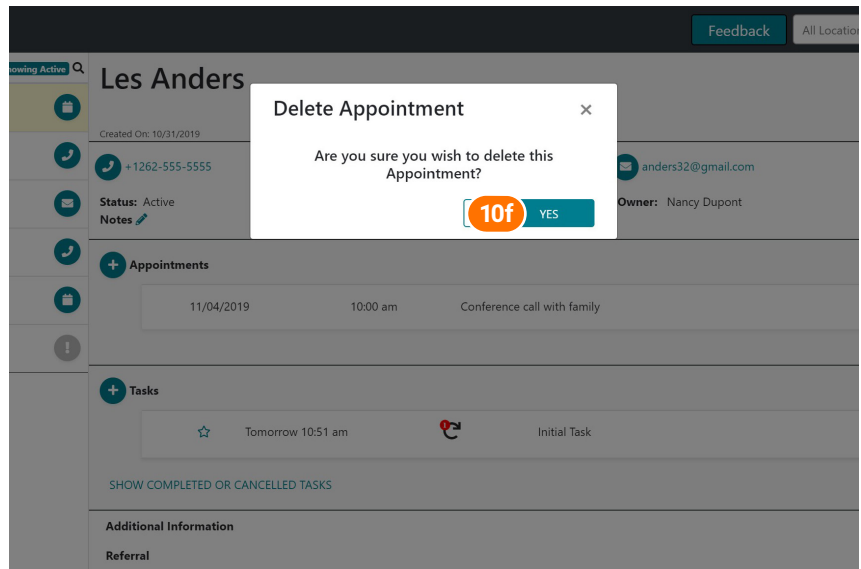
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Delete an Appointment

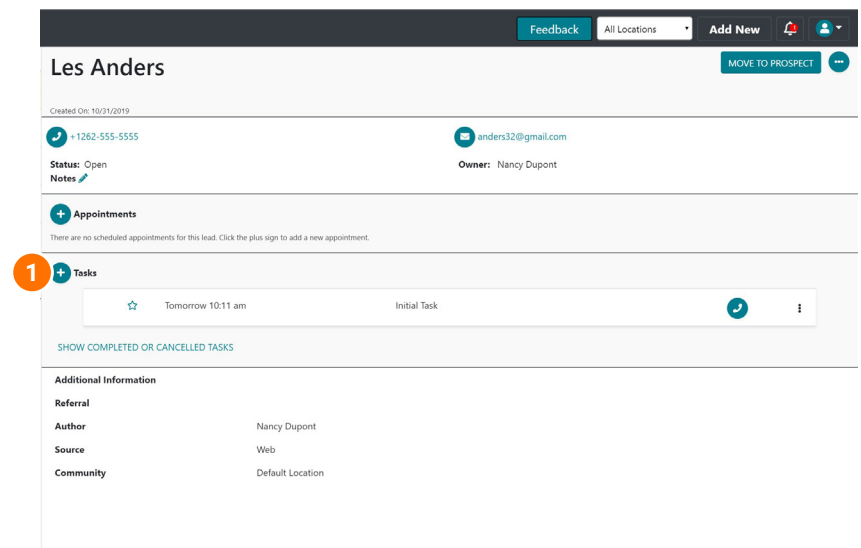
Select **Delete** from the More menu. The Delete Appointment pop-up window will display.

- 10f** Click **Yes** to delete. The appointment will be deleted without any record.
NOTE: You cannot undo this action.



Add a Task

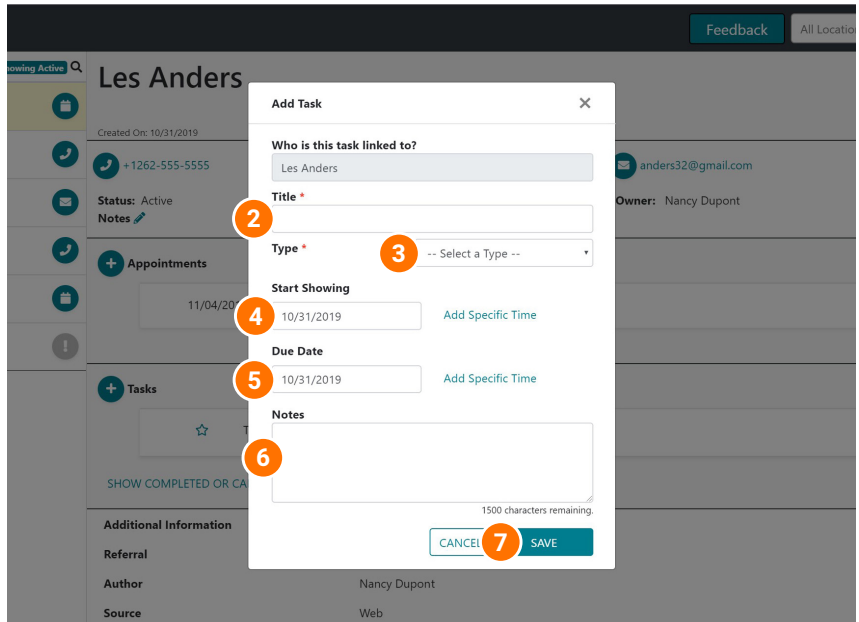
- 1** Click the **+** (Plus sign). The Add Task pop-up window will display.



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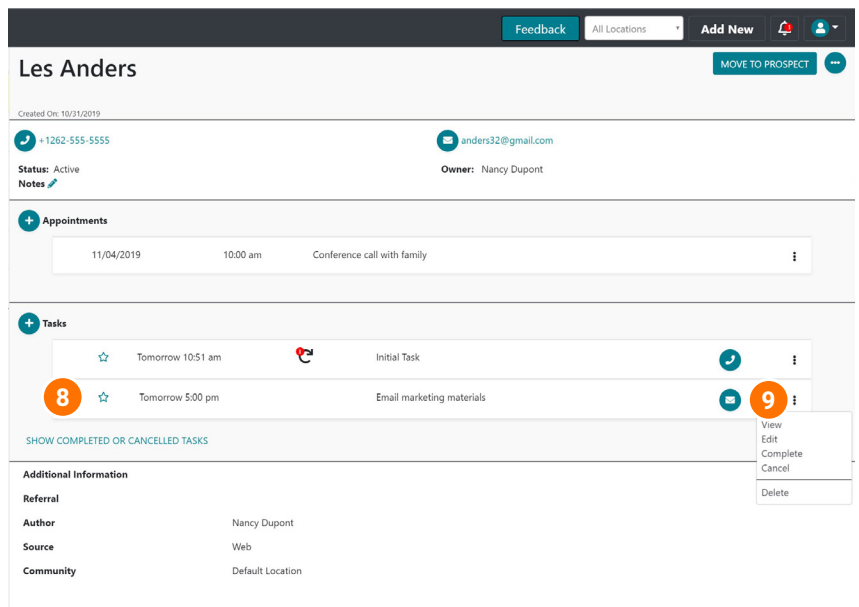
- 2 Enter a **Title** in the text field.
- 3 Select a **Type** from the dropdown list (Phone, Email, Marketing Task, Work Entry).
NOTE: A Work Entry logs Tasks that have occurred in the past.
- 4 Enter a **Date** for the Task to start showing in the list. Click Add Time to enter a specific time for the Task to start showing
NOTE: If a date in the future is selected, a link for future Tasks will display in the Tasks section. See page 28.
- 5 Enter a **Due Date**. Click Add Specific Time to enter a specific time the Task is due.
- 6 Enter **Notes** in the paragraph field.
- 7 Click **Save**.



The screenshot shows the 'Add Task' modal for a lead named 'Les Anders'. The form has the following fields and callouts:

- 2** Title: A text input field.
- 3** Type: A dropdown menu with the option '-- Select a Type --'.
- 4** Start Showing: A date input field set to 10/31/2019, with a link 'Add Specific Time'.
- 5** Due Date: A date input field set to 10/31/2019, with a link 'Add Specific Time'.
- 6** Notes: A large text area for notes, with a '1500 characters remaining' indicator.
- 7** Save: A green button at the bottom right of the modal.

- 8 The new Task will display in the Tasks list. The Action icon in the Leads list will reflect this task type if it is the upcoming task.
- 9 Click the **⋮** (More menu) for more options (View, Edit, Complete, Cancel, Delete).



The screenshot shows the 'Les Anders' lead profile. The 'Tasks' section is expanded, showing a list of tasks. The new task 'Email marketing materials' is highlighted with a star icon. Numbered callouts 8 and 9 indicate the task's appearance and the more menu options.

- 8** The new Task will display in the Tasks list. The Action icon in the Leads list will reflect this task type if it is the upcoming task.
- 9** Click the **⋮** (More menu) for more options (View, Edit, Complete, Cancel, Delete).

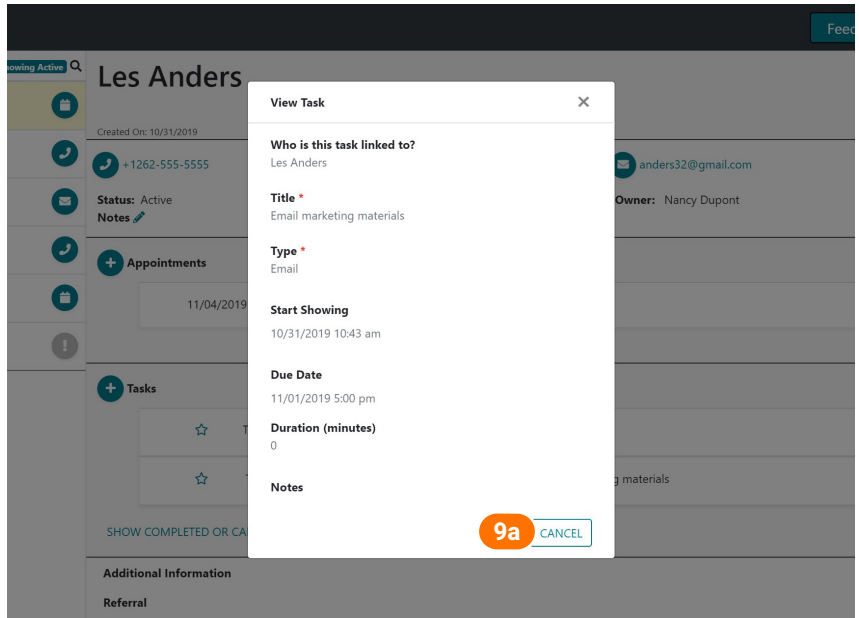


View a Task

Select **View** from the More menu. The View Task pop-up window will display.

NOTE: Editing is not available in this window.

- 9a** Click the **X** or click **Cancel** to close the window.



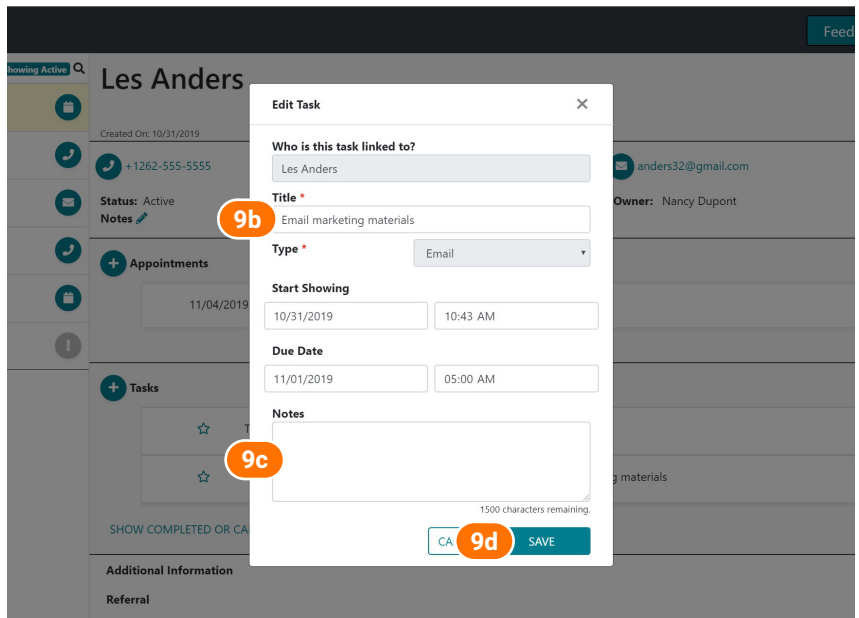
Edit a Task

Select **Edit** from the More menu. The Edit Task pop-up window will display.

- 9b** Edit Task details (Title, Type, Start Showing, Due Date).

- 9c** Enter **Notes** in the paragraph field.

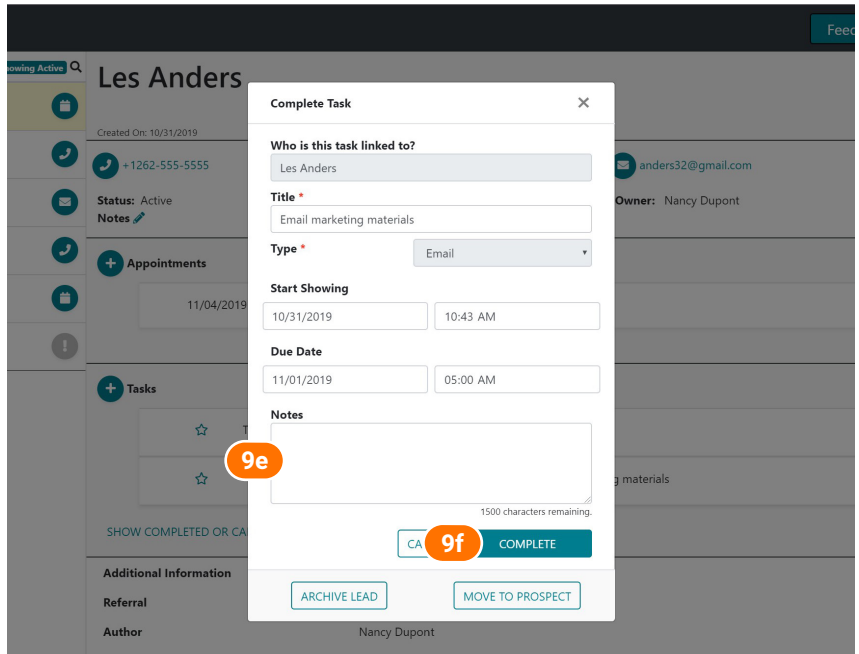
- 9d** Click **Save**.




Complete a Task

Select **Complete** from the More menu. The Complete Task pop-up window will display.

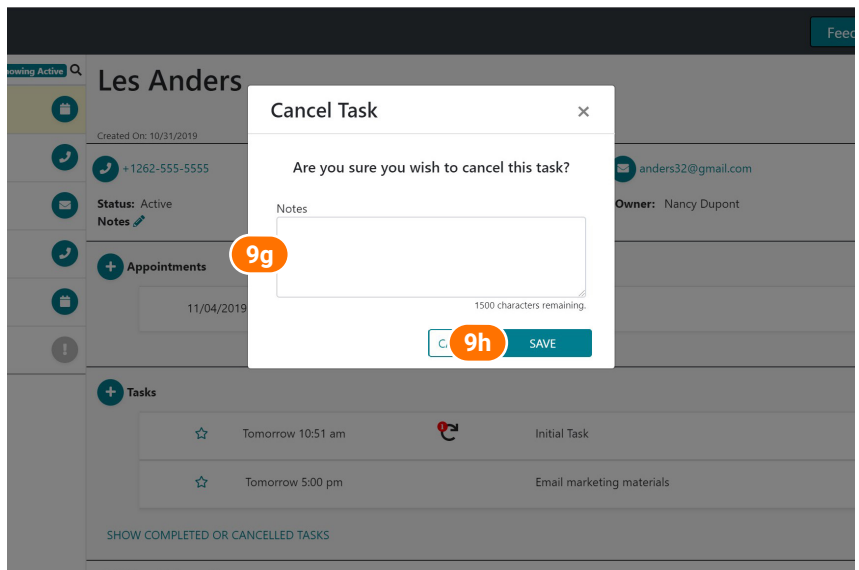
- 9e** Enter **Notes** in the paragraph field.
- 9f** Click **Complete** to mark the Task as completed.



Cancel a Task

Select **Cancel** from the More menu. The Cancel Task pop-up window will display.

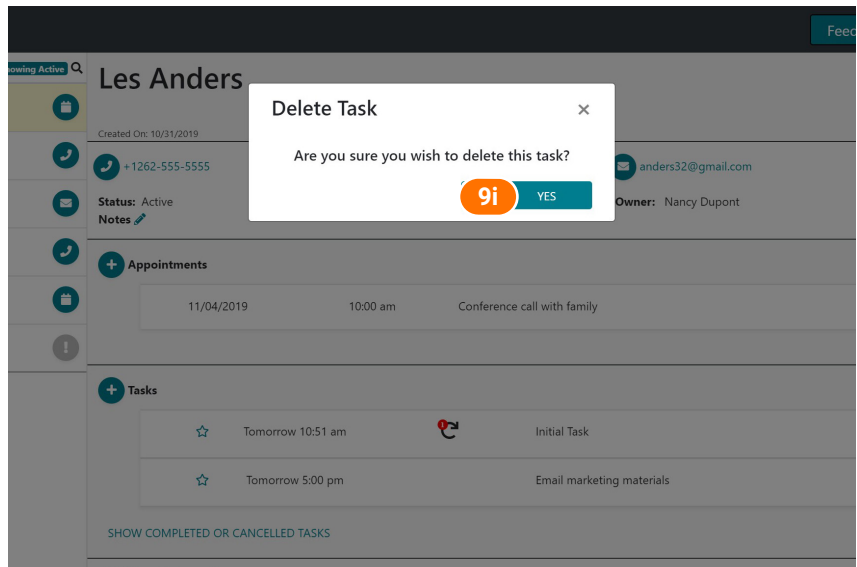
- 9g** Enter **Notes** in the paragraph field.
- 9h** Click **Save**. The Task will move to the cancelled Tasks list.



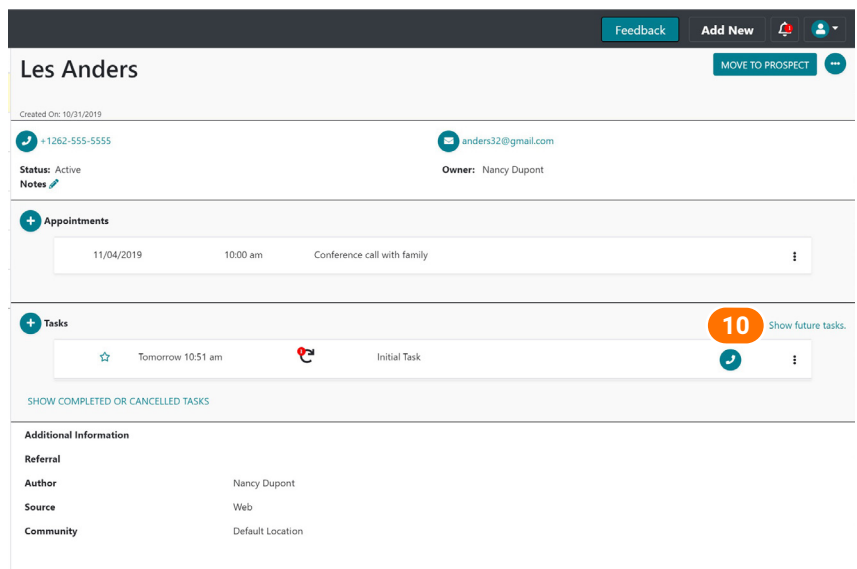

Delete a Task

Select **Delete** from the More menu. The Delete Task pop-up window will display.

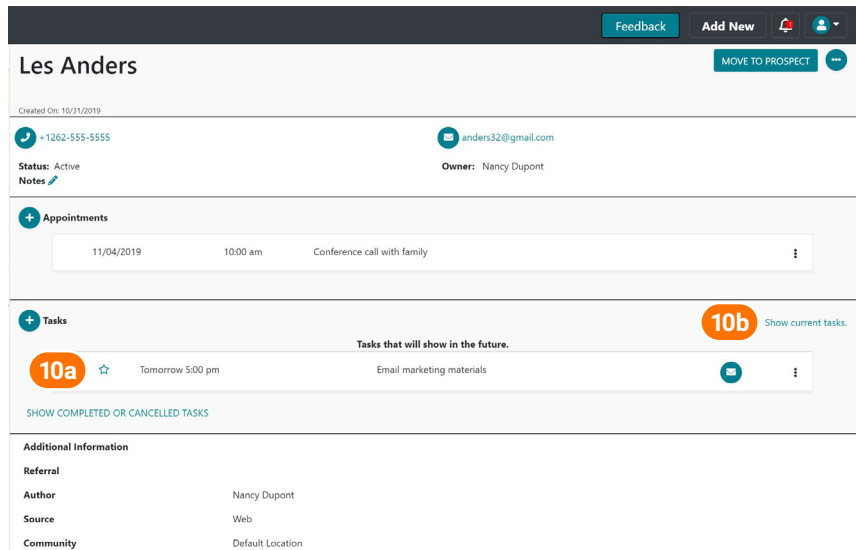
- 9i** Click **Yes** to delete. The Task will be deleted without any record.
NOTE: You cannot undo this action.



- 10** When the Start Showing Date for a task is in the future, the **Show future tasks** link will display. Click the link to view the list of Future Tasks.



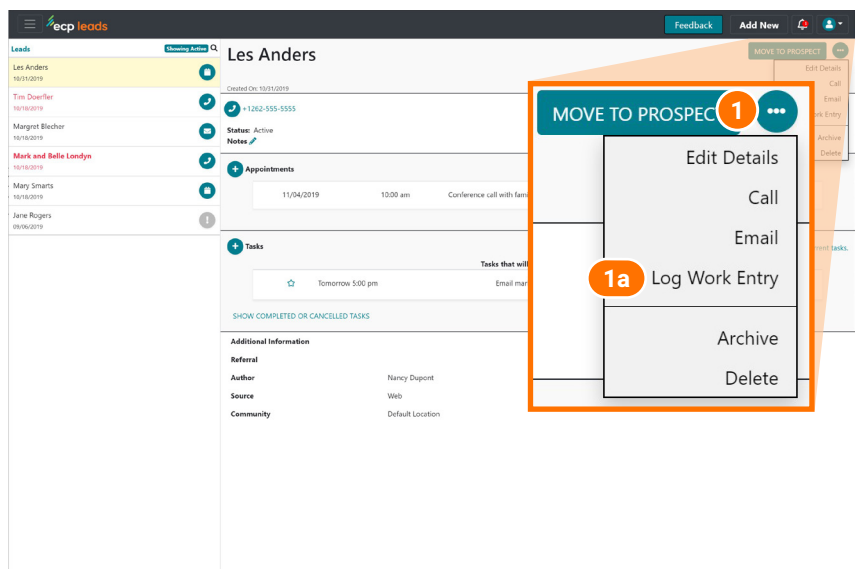
- 10a** Future Tasks will display in the list.
- 10b** Click **Show current tasks** to return to the current Tasks list.



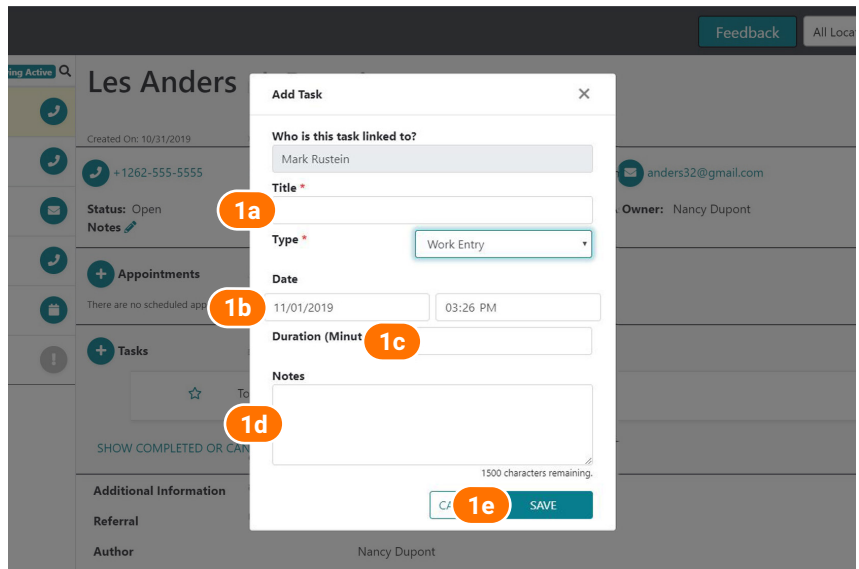
Log Work Entry

This option is only for logging tasks that occurred in the past. When you save, it will automatically display as a completed task.

- 1** Click the **More menu** (three dots). The More menu will display
- 1a** Select **Log Work Entry**. The Log Work Entry pop-up window will display.

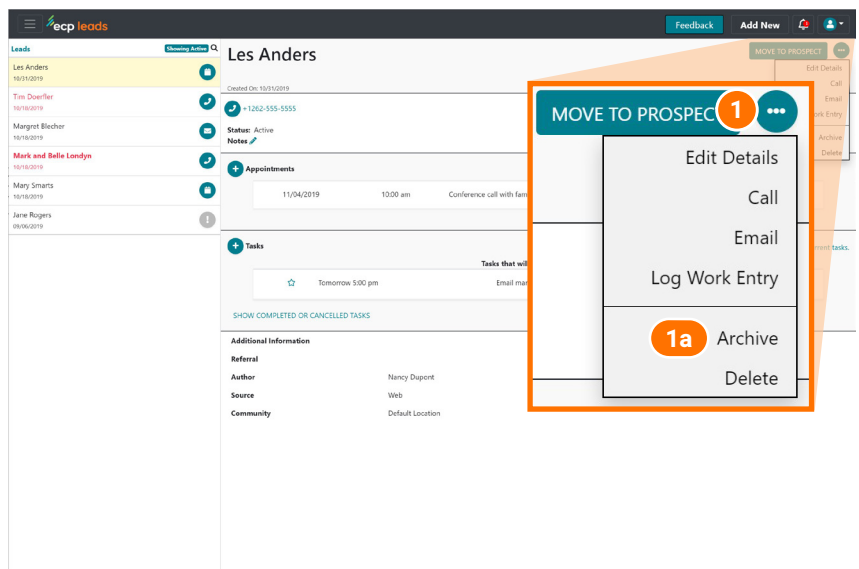



- 1a** Enter a **Title**.
- 1b** Enter a **Date** and **Time**.
- 1c** Enter a **Duration** in minutes.
- 1d** Enter **Notes** in the paragraph field.
- 1e** Click **Save**.



Archive a Lead

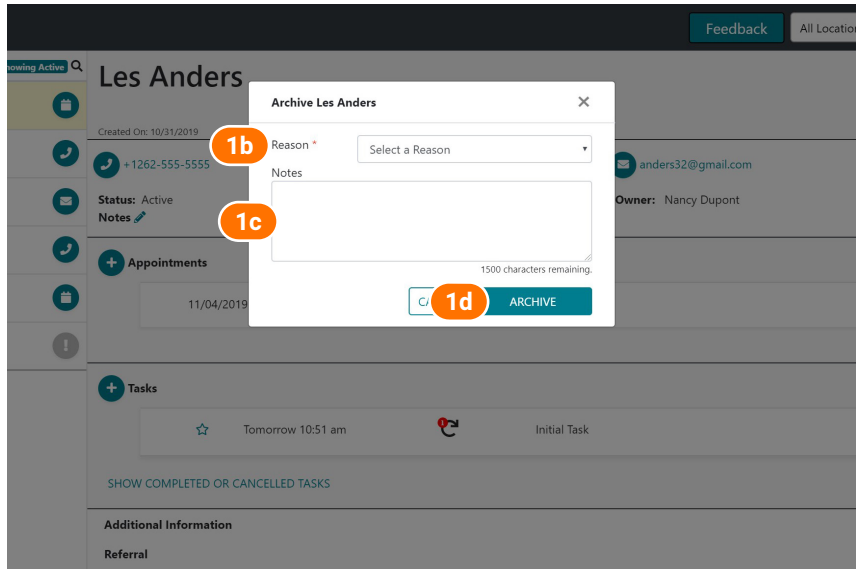
- 1** Click the **⋮** (More menu). The More menu will display.
- 1a** Click **Archive**. The Archive pop-up window will display.




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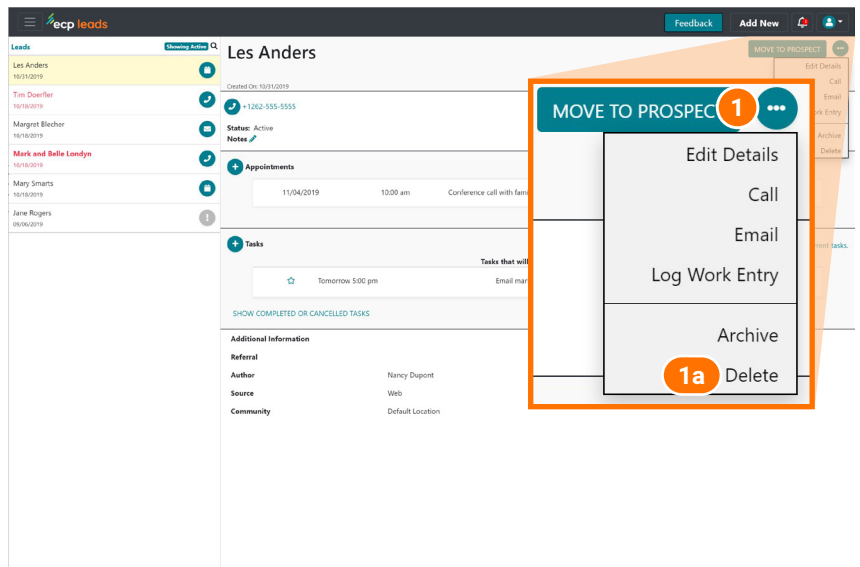
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- 1b** Select a **Reason** from the dropdown list.
- 1c** Enter **Notes** in the paragraph field.
- 1d** Click **Archive**. The Lead will be moved to the Archived Leads list. See page 9 to view Archived Leads.

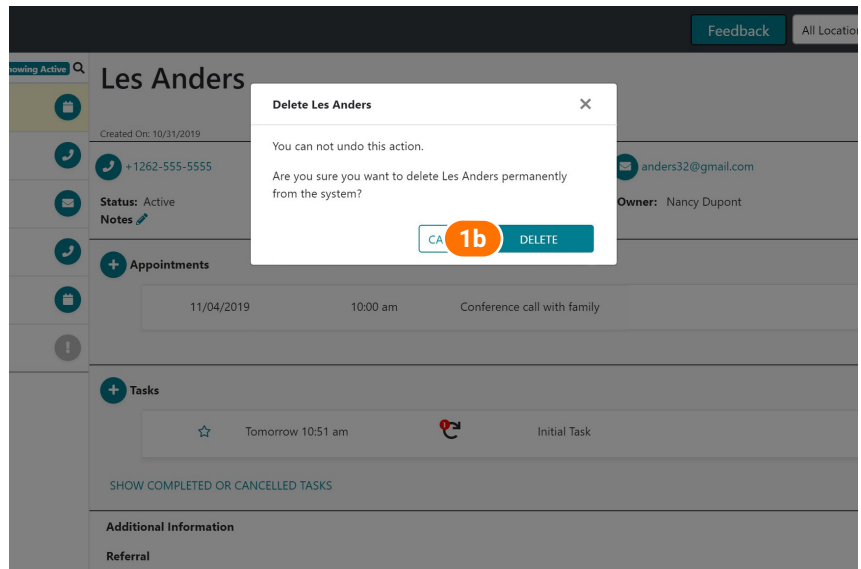


Delete a Lead

- 1** Click the **...** (More menu). The More menu will display.
- 1a** Click **Delete**. The Delete pop-up window will display.

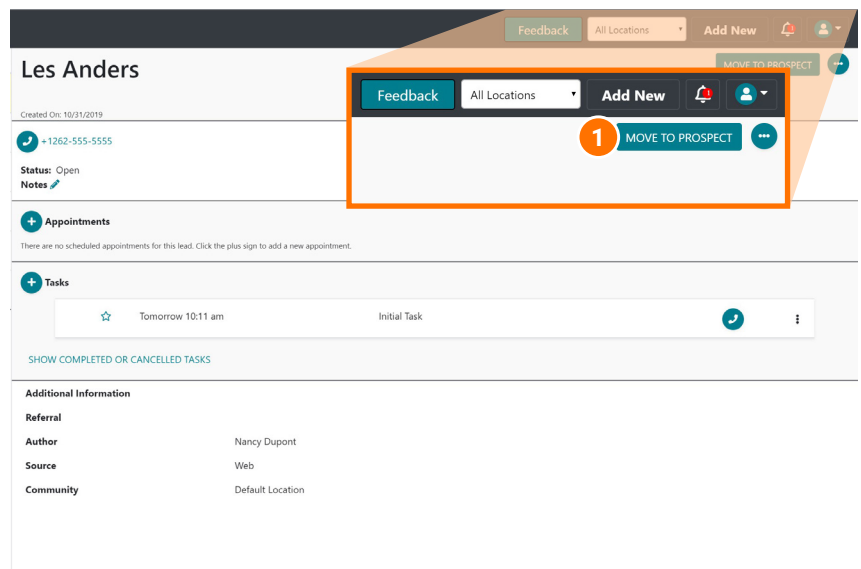



- 1b** Click **Delete**. The Lead will be deleted.
NOTE: You cannot undo this action.



Move a Lead to a Prospect

- 1** Click **Move to Prospect**. The Move to Prospect pop-up window will display.



1a Select **Yes** or **No** if Lead is the resident.

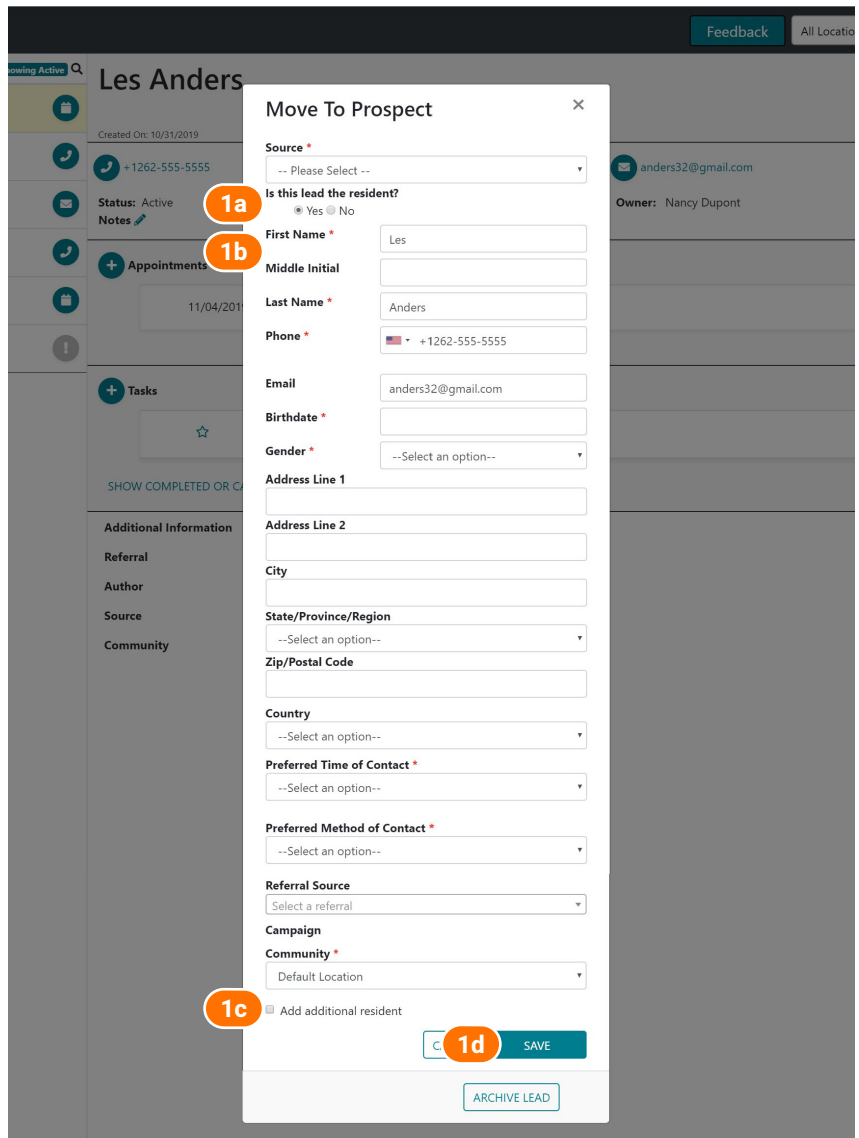
1b Enter **additional details** about the Lead in the text fields. An asterisk indicates a required field.

1c Click the **Checkbox** to add an additional resident if applicable.

1d Click **Save**. This will move the Lead to the Prospects list and open the Prospect card.

NOTE: This step cannot be completed without entering all the required information.

TIP: To archive a Lead, see page 30.



Move To Prospect

Source *

-- Please Select --

Is this lead the resident?

☒ Yes ☐ No

First Name *

Les

Middle Initial

Last Name *

Anders

Phone *

+1262-555-5555

Email

anders32@gmail.com

Birthdate *

Gender *

--Select an option--

Address Line 1

Address Line 2

City

State/Province/Region

--Select an option--

Zip/Postal Code

Country

--Select an option--

Preferred Time of Contact *

--Select an option--

Preferred Method of Contact *

--Select an option--

Referral Source

Select a referral

Campaign

Community *

Default Location

☐ Add additional resident

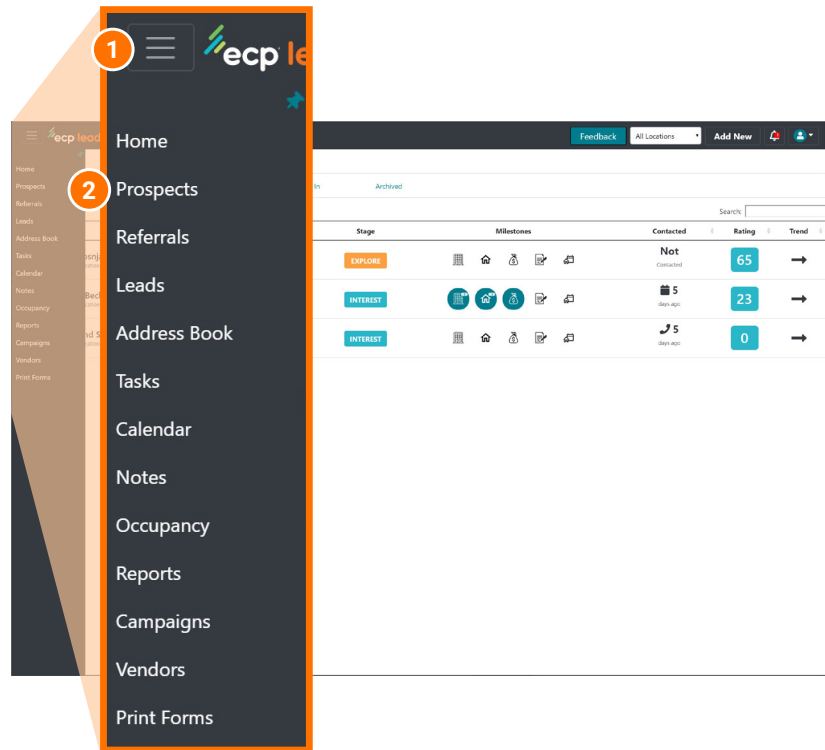
1c **1d** **SAVE**

ARCHIVE LEAD



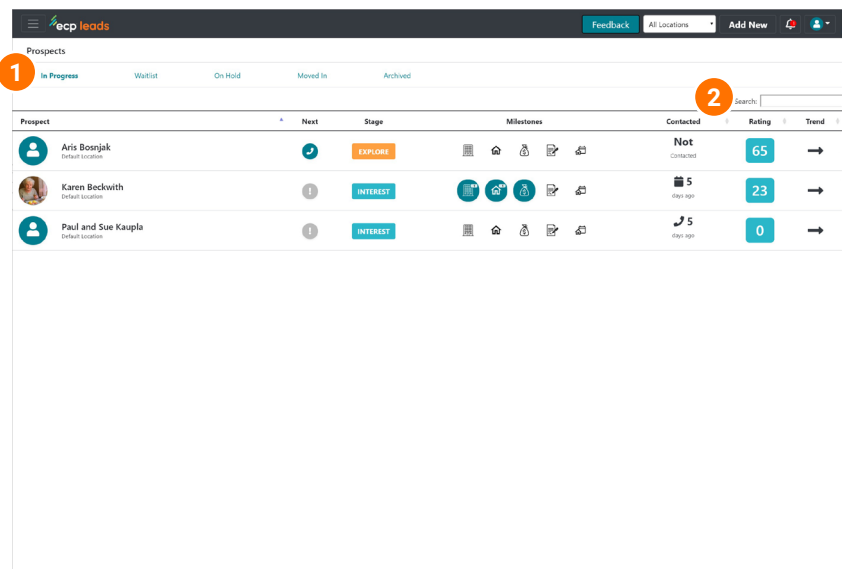
PROSPECTS

- 1 Click the ≡ (hamburger icon). The hamburger menu will display.
- 2 Click **Prospects**. The Prospects list will display.



List View Navigation

- 1 **Status Tabs:** In Progress is default. Click a Tab to view the list of Prospects in that status.
- 2 **Search Field:** Enter a name in the search field to search for a specific Prospect.



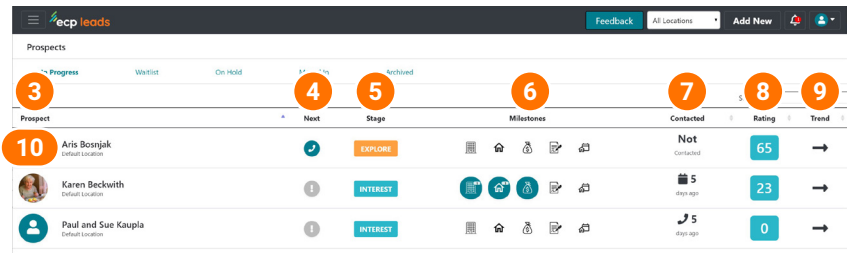
Column headings

Sort order can be changed from newest to oldest by clicking the up/down arrows.

- 3 Prospect:** Name of Prospects.
- 4 Next:** Action icon indicates next scheduled task for the Prospect.
- 5 Stage:** Indicates the current stage of the Prospect.
Interest: Interested in learning more about Assisted Living.
Explore: Exploring options.
Plan: Planning to move to an Assisted Living community.
Commit: Ready to move in to your community.
- 6 Milestones:** Quick view of progress of move in process.
 **Tours:** A tour of your community was done.
 **Home Visit:** A visit to the Prospect in their current living environment was done.
 **Deposit:** A deposit has been received to hold a place in your community.
 **Contract:** A contract has been signed.
 **Move In Date:** A move in date has been scheduled.
- 7 Contacted:** Action icon with a number indicating days since last contact.
- 8 Rating:** A score you give that predicts how well the Prospect will fit in your home, based on 4 factors. Default weights are 25% each. Adjust the weight of each factor in Settings.
- 9 Trend:** Indicates your feeling of move-in probability for the Prospect.

Navigation

- 10** Click **Prospect Icon** or **Name**. The Prospect details window will display.



Prospect	Next	Stage	Milestones	Contacted	Rating	Trend
Aris Bosnjak Default Location		EXPLORE	    	Not Contacted	65	→
Karen Beckwith Default Location		INTEREST	    	5 days ago	23	→
Paul and Sue Kaupla Default Location		INTEREST	    	5 days ago	0	→

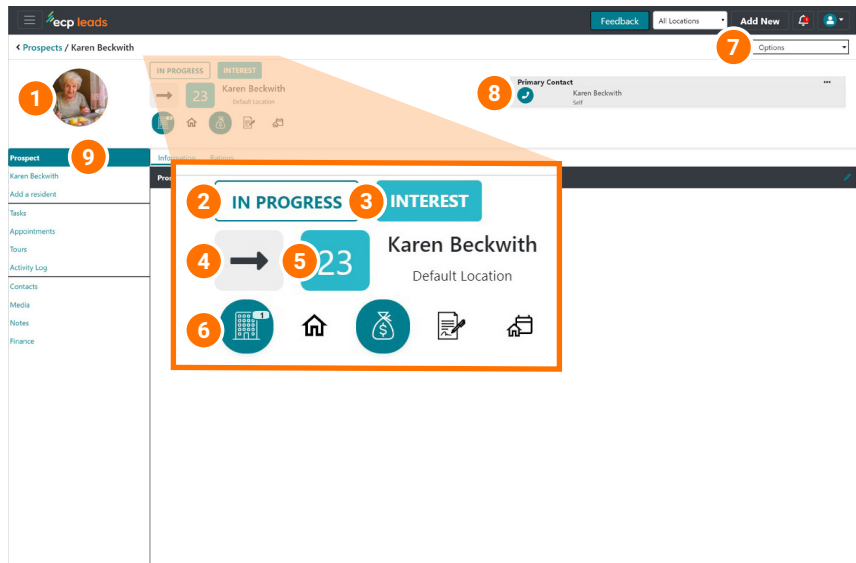


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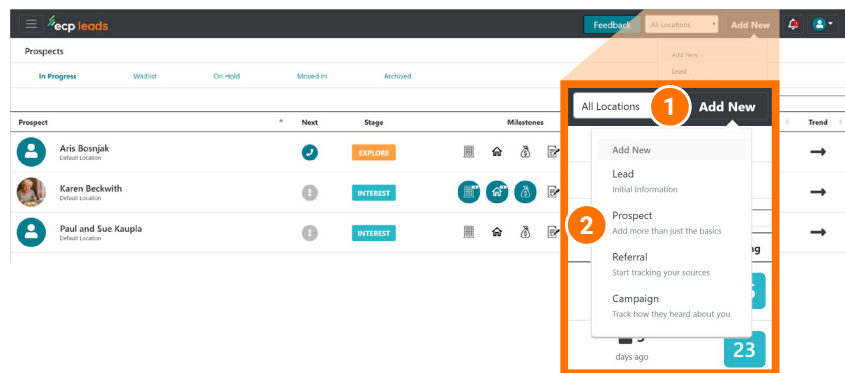
Much of the information from the list view carries over to the details view. Changes to Status, Stage, Trend, Rating, and Milestones can be done from the list view or details view.

- 1 Profile photo
- 2 Status
- 3 Stage
- 4 Trend
- 5 Rating
- 6 Milestones
- 7 Options Menu
- 8 Primary Contact
- 9 Prospects Menu

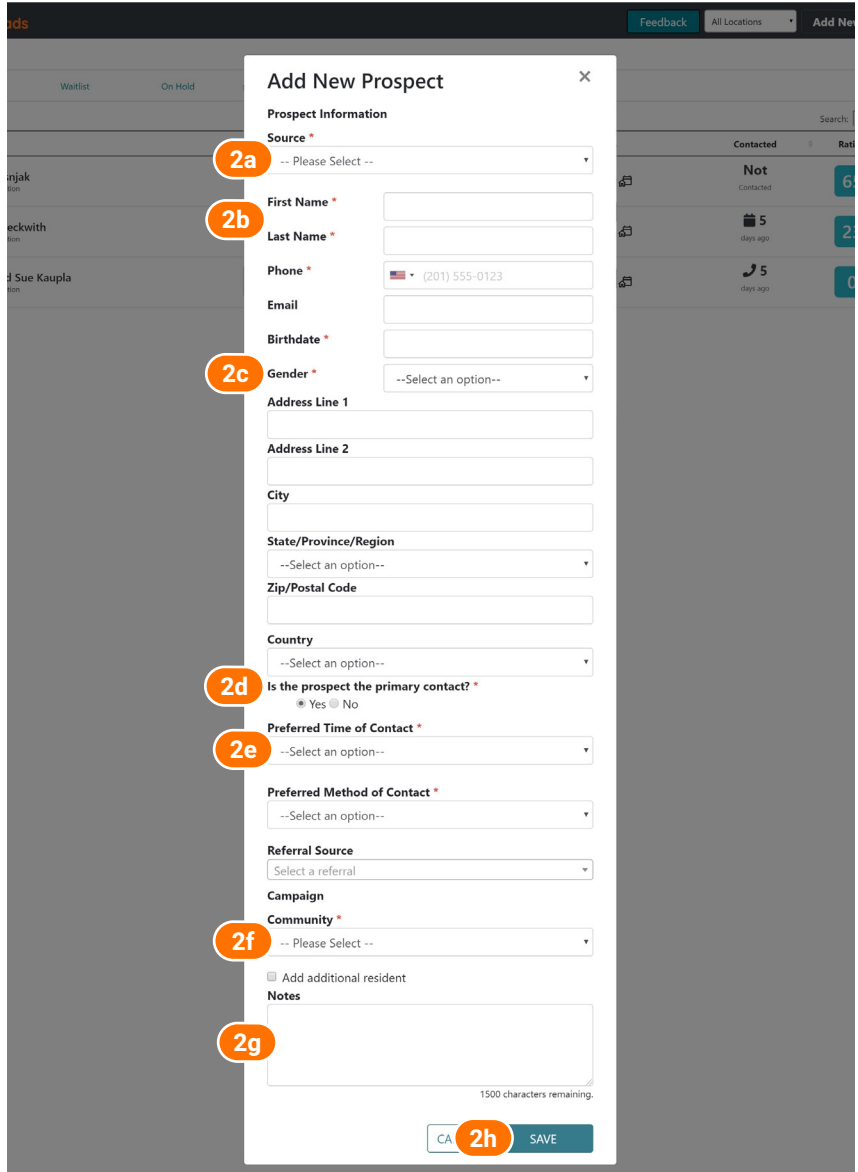


Add New Prospect

- 1 Click **Add New**. The Add New dropdown list will display.
- 2 Click **Prospect**. The Add New Prospect pop-up window will display.



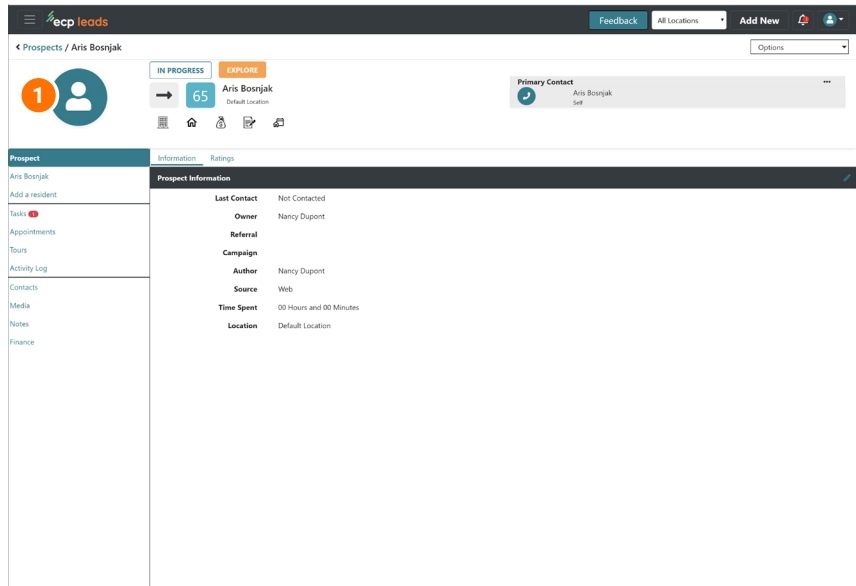
- 2a** Select the **Source** from the dropdown list.
- 2b** Enter the **First Name, Last Name, Phone, and Birthdate** in the text fields. These are required.
- 2c** Select **Gender** from the dropdown list.
- 2d** Click **Yes** or **No** if the Prospect is the primary contact.
- 2e** Select **Preferred Time** and **Method of Contact** from the dropdown lists.
- 2f** Select the **Community** from the dropdown list.
- 2g** Enter **Notes** in the paragraph field.
- 2h** Click **Save**. The Prospect will be added to the list and the Prospect details window will display.



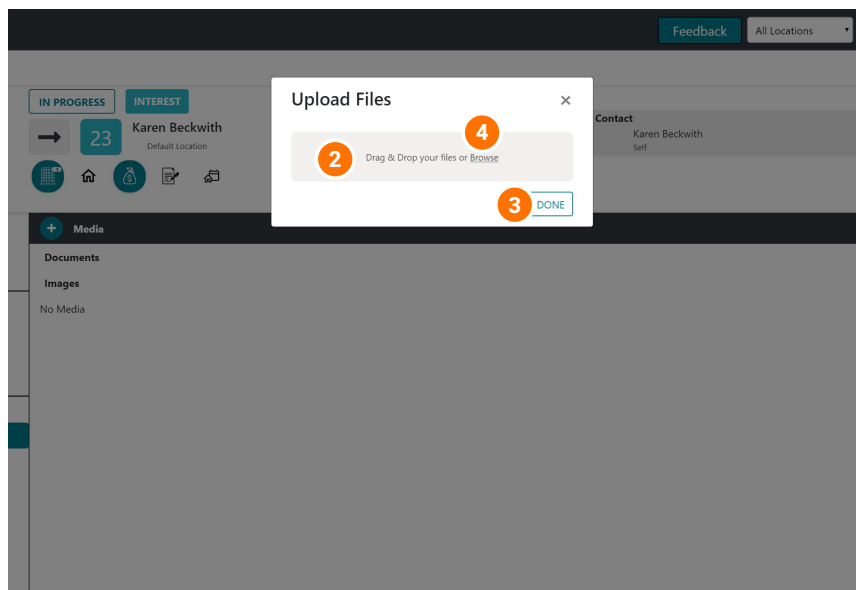

Edit Prospect Details

Add a profile photo

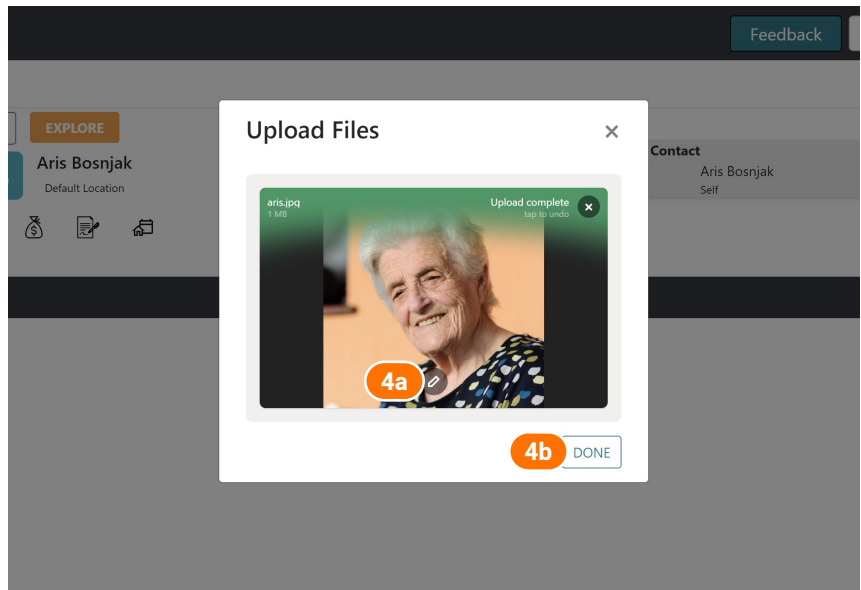
- 1 Click the **placeholder image**. The Upload Files pop-up window will display.



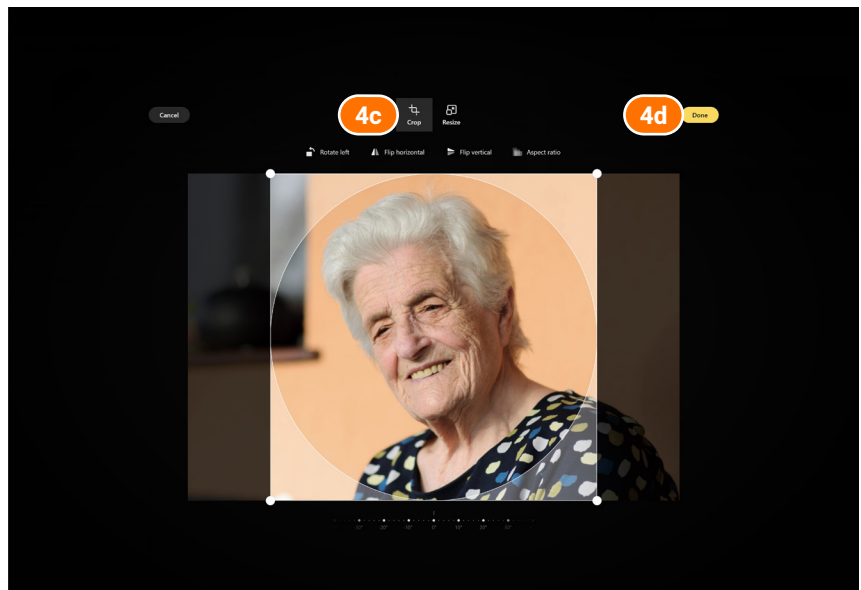
- 2 Drag and drop a file to the upload box.
 - 3 Click **Done**.
- or
- 4 Click **Browse** to navigate to a file on your computer. Click Open.



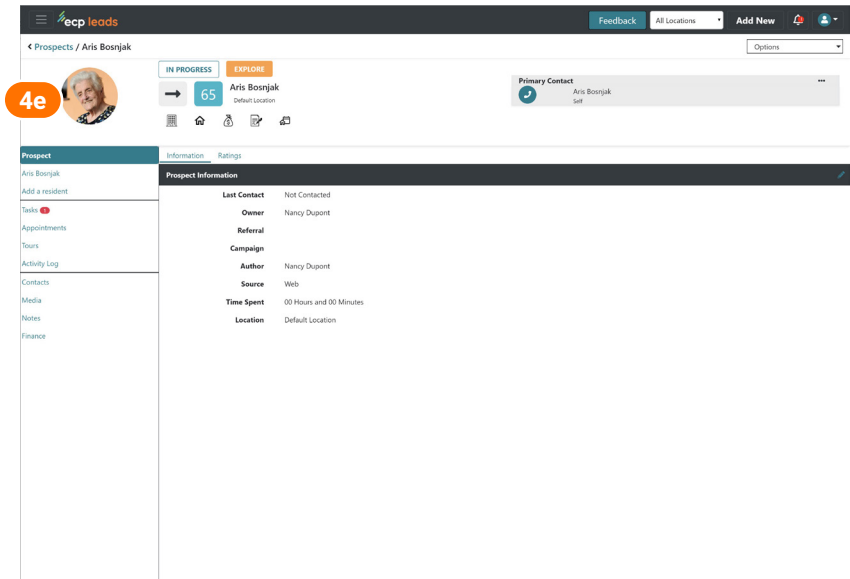
- 4a** Click the  (Edit icon) to adjust the image. The image editing window will display.
- 4b** Click **Done** to use the photo as is.



- 4c** Use the editing tools to crop, rotate, or resize the photo as needed.
- 4d** Click **Done**.

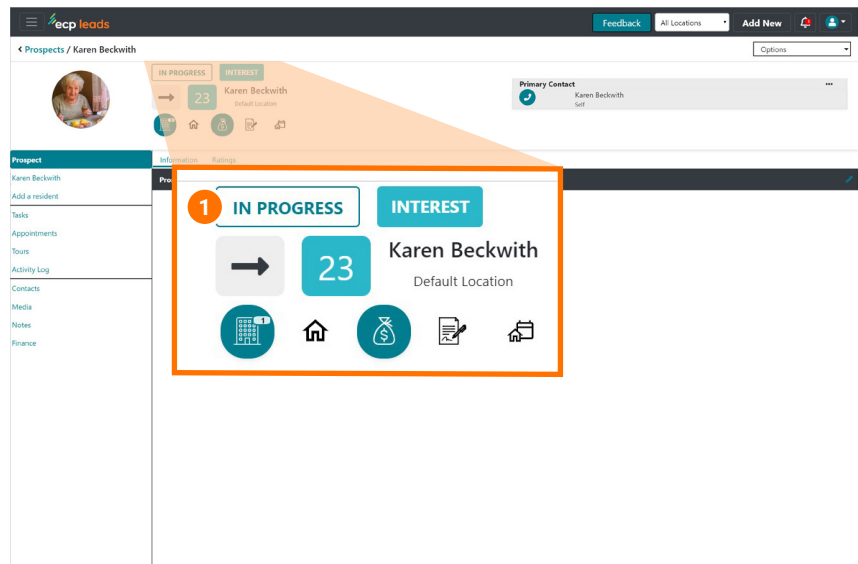


4e The new profile photo will display.



Change the Status

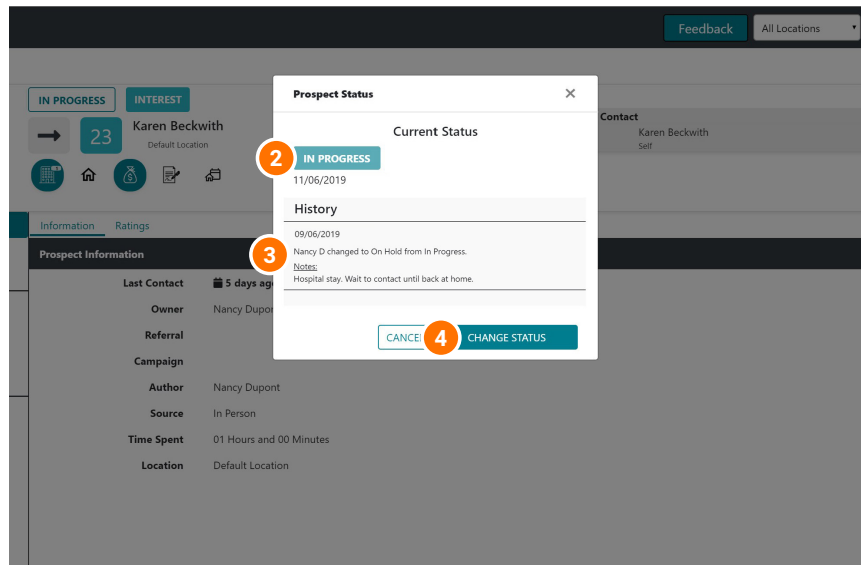
1 Click the **Status** button. The Prospect Status pop-up window will display.



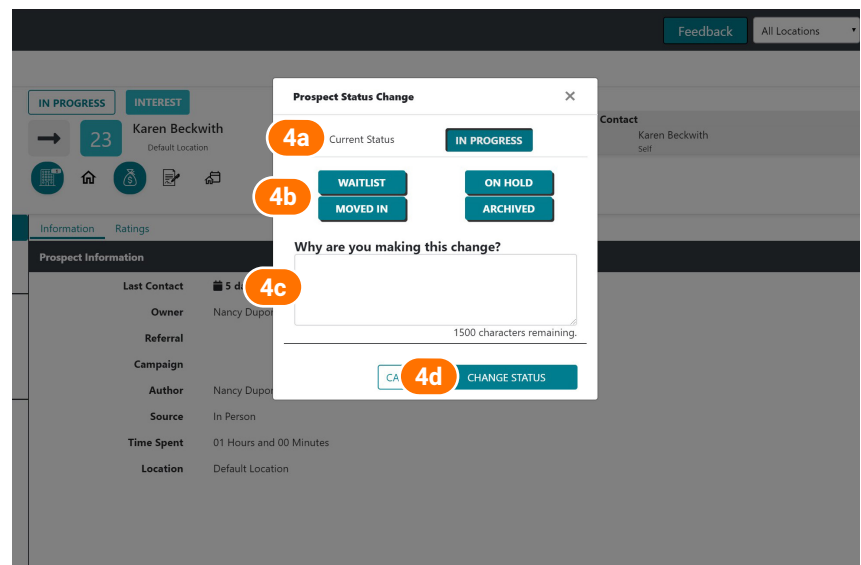
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- 2 **Current Status** is shown at the top along with the date the status was changed.
- 3 A log of changes in status will display in the **History** box.
- 4 Click **Change Status**. The Prospect Status pop-up window will display.

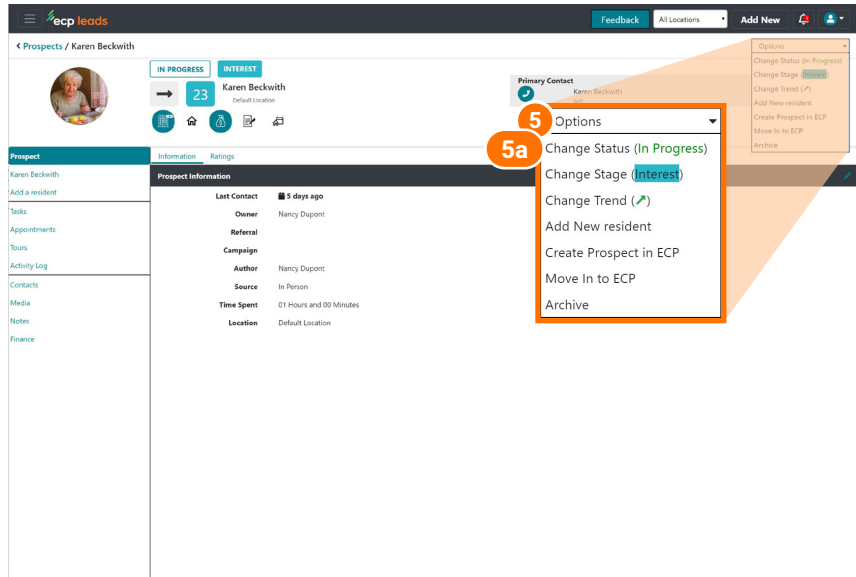


- 4a **Current status** is shown at the top.
- 4b Click the **Button** for the new status.
- 4d Enter a **Reason** for the status change in the paragraph field.
- 4d Click **Change Status**.



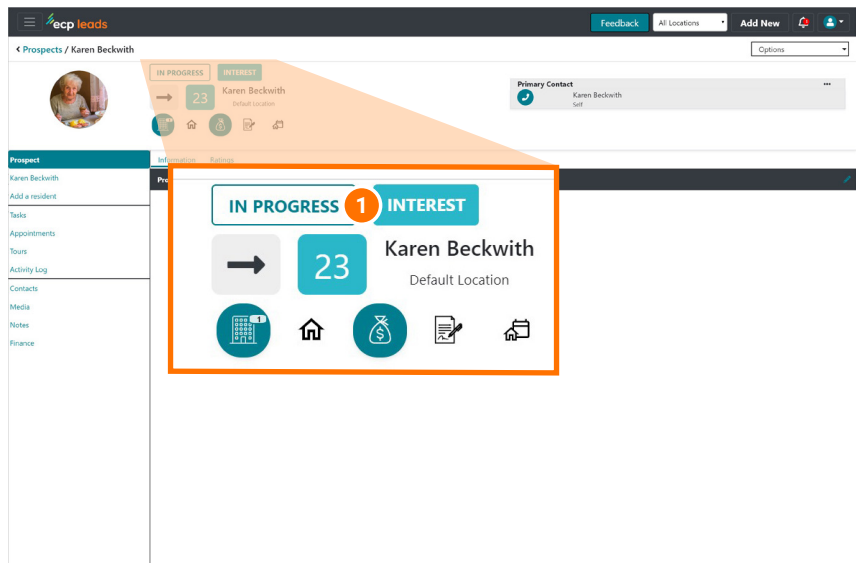
Status can also be changed from the Options menu.

- 5 Click the **Options** menu. The Options menu will display.
- 5a Select **Change Status** from the dropdown list. The Prospect Status Change pop-up window will display. Follow steps 4a-4d above.



Change the Stage

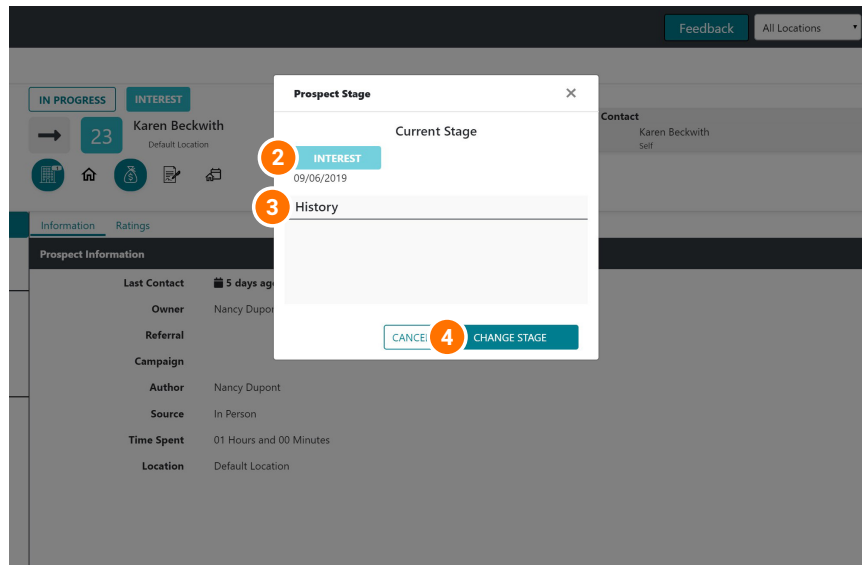
- 1 Click the **Stage** button. The Prospect Stage pop-up window will display.



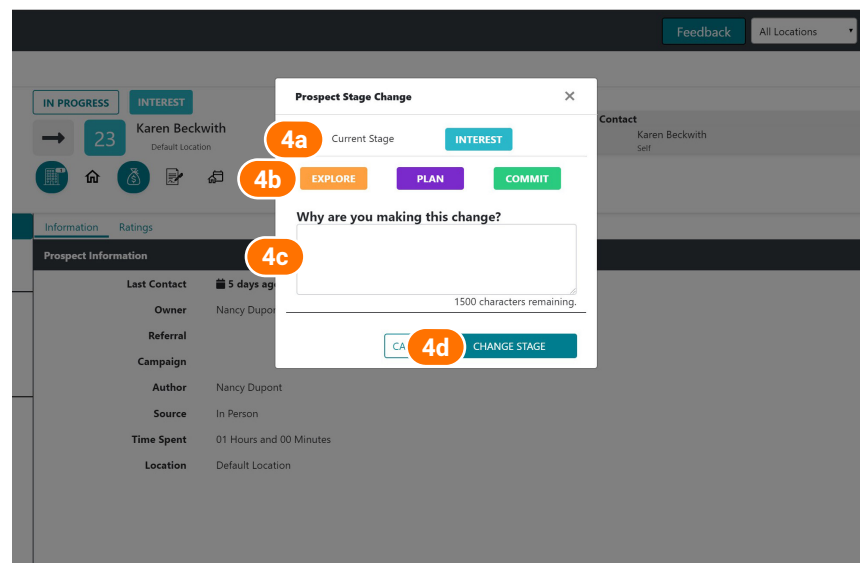
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- 2 **Current Stage** is shown at the top along with the date the status was changed.
- 3 A log of changes in stage will display in the **History** box.
- 4 Click **Change Stage**. The Prospect Stage Change pop-up window will display.

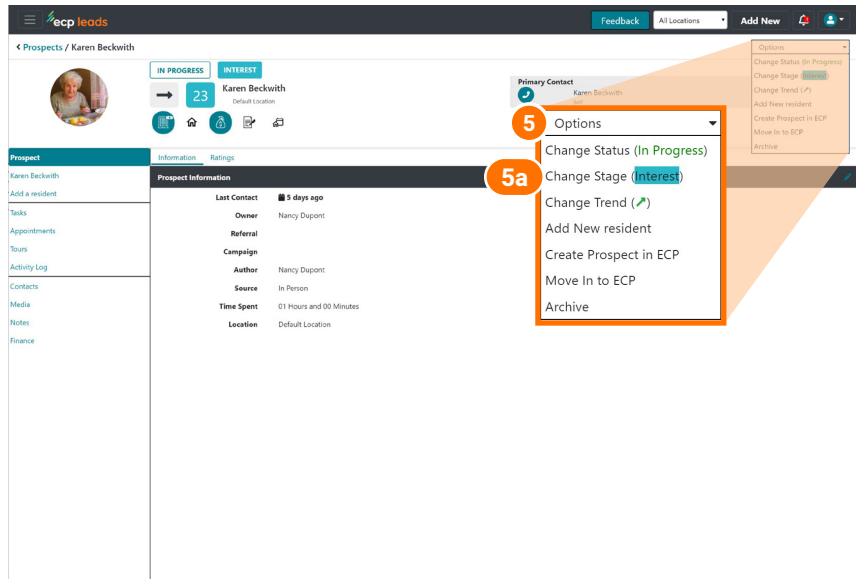


- 4a **Current Stage** is shown at the top.
- 4b Click the **Button** for the new stage.
- 4c Enter a **Reason** for the stage change in the paragraph field.
- 4d Click **Change Stage**.



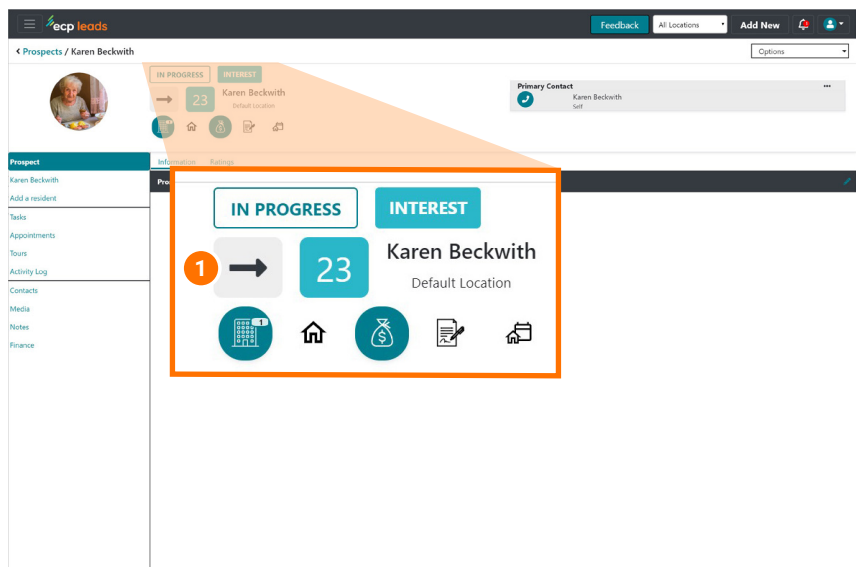
Stage can also be changed from the Options menu.

- 5 Click the **Options** menu. The Options menu will display.
- 5a Select **Change Stage** from the dropdown list. The Prospect Stage Change pop-up window will display. Follow steps 4a-4d above.



Change the Trend

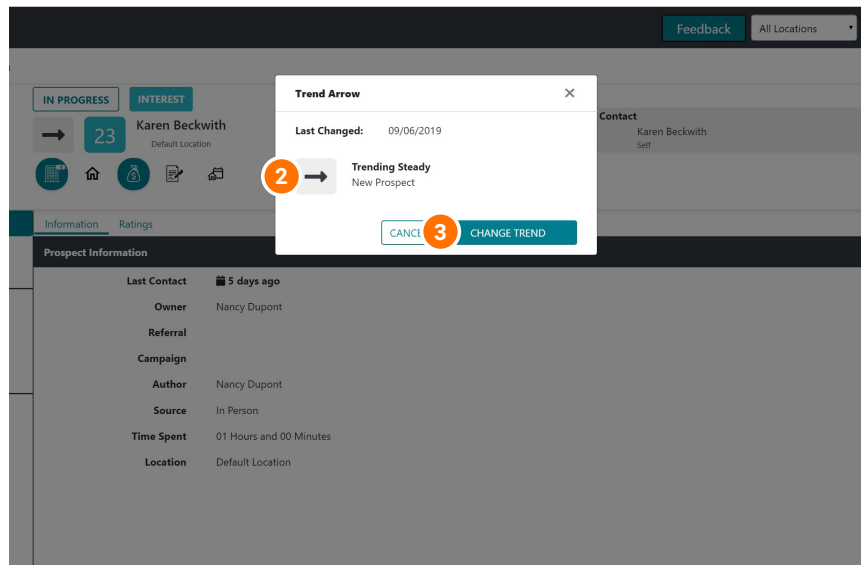
- 1 Click the **Trend arrow**. The Trend Arrow pop-up window will display.



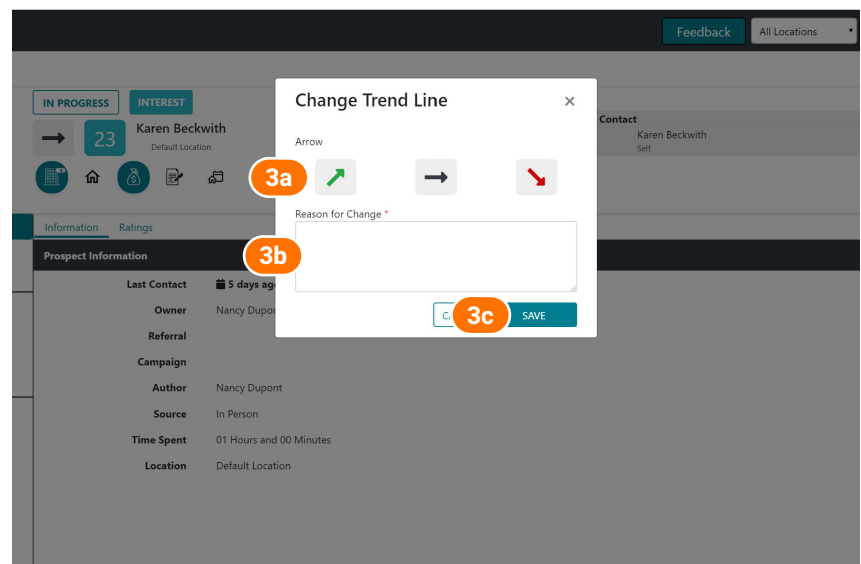
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- 2 **Current Trend** is shown at the top along with the date the status was changed and a comment.
- 3 Click **Change Trend**. The Change Trend Line pop-up window will display.

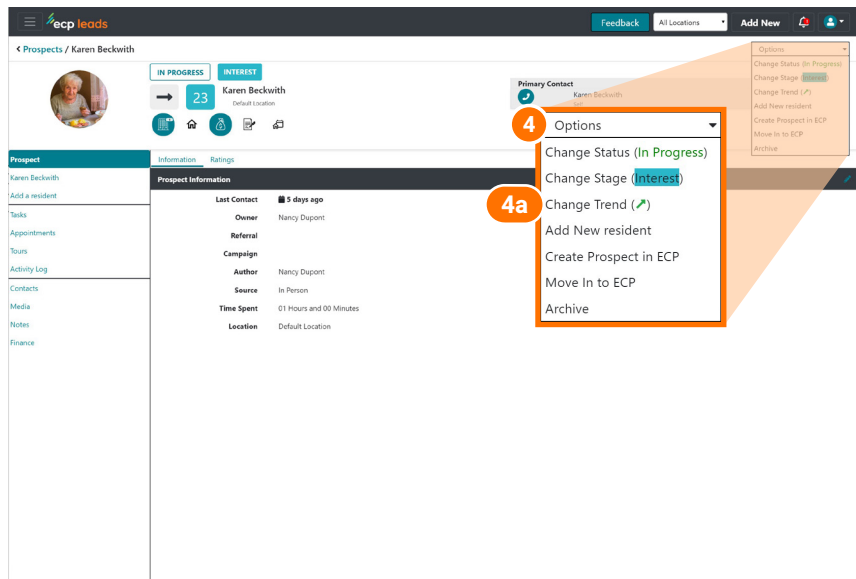


- 3a Click the **Button** for the new trend.
- 3b Enter a **Reason** for the trend change in the paragraph field.
- 3c Click **Save**.



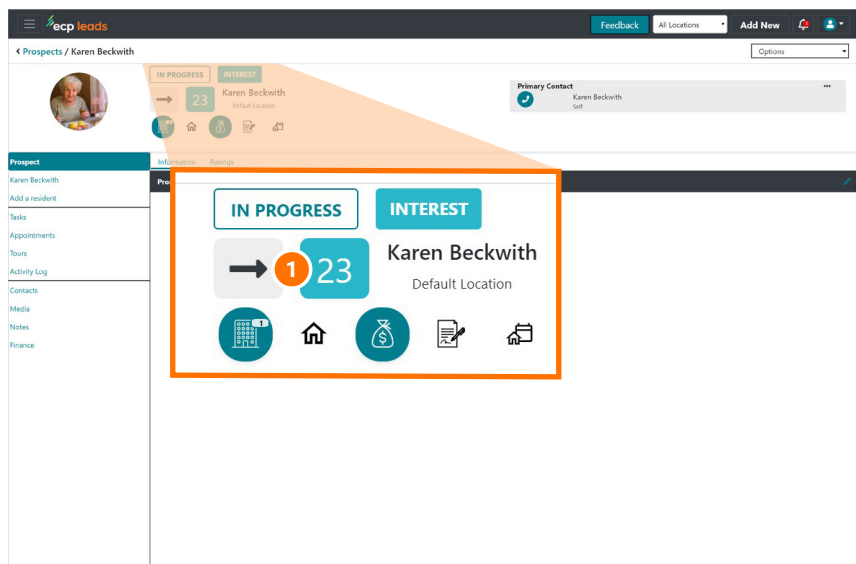
Trend can also be changed from the Options menu.

- 4 Click the **Options** menu. The Options menu will display.
- 4a Select **Change Trend** from the dropdown list. The Change Trend Line pop-up window will display. Follow steps 3a-3c above.

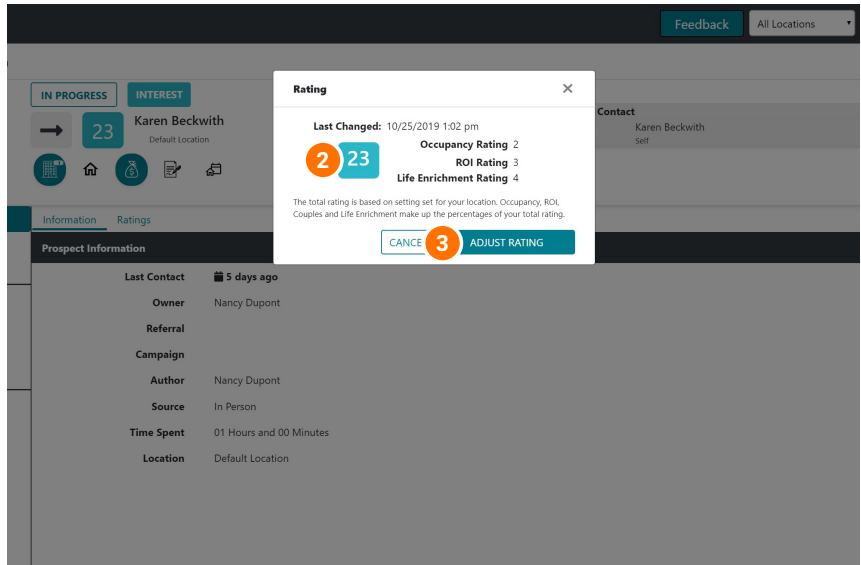


Change the Rating

- 1 Click the **Rating** button. The Rating pop-up window will display.



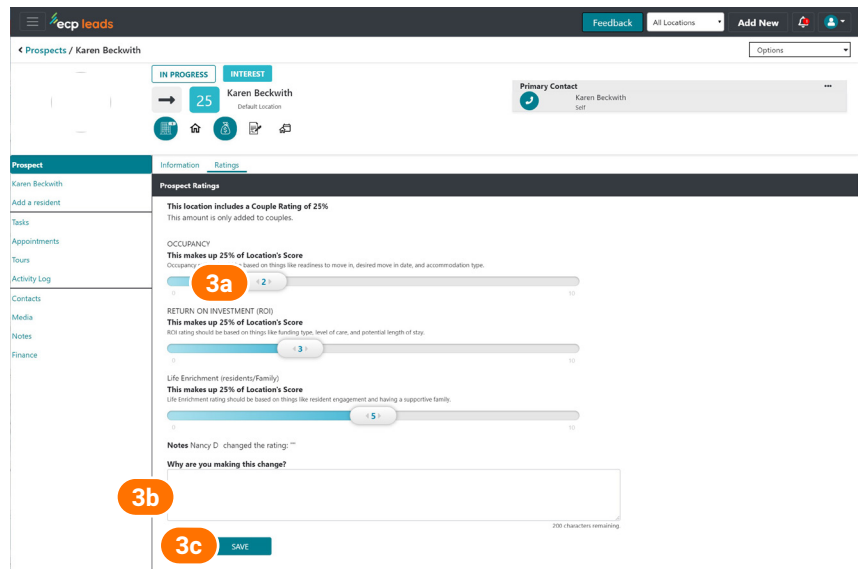
- 2 **Current Rating** is shown at the top along with the date the rating was changed.
- 3 Click **Adjust Rating**. The Ratings tab will display.



- 3a Click and drag a **Slider** to adjust the score for that category.

- 3b Enter **Notes** in the paragraph field.

- 3c Click **Save**.

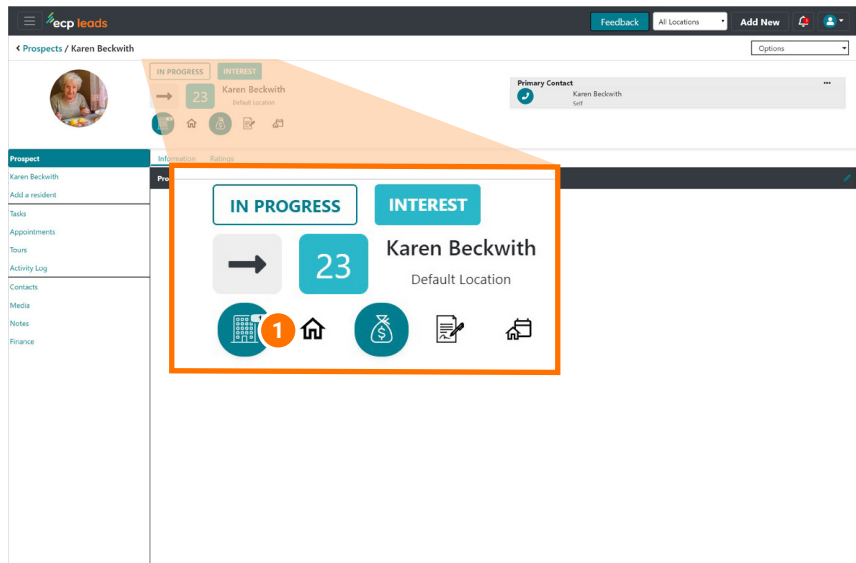



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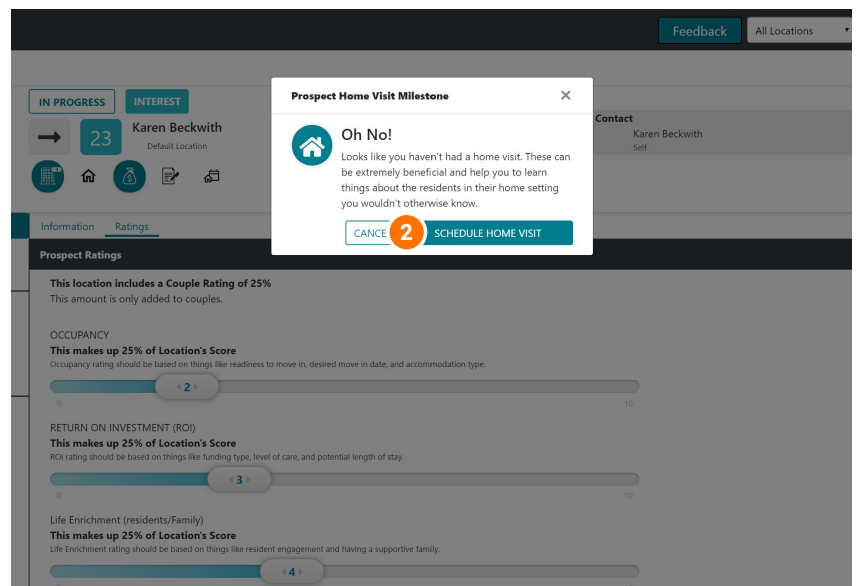
Complete a Milestone

- 1 Click a **Milestone icon**. The Prospect Milestone pop-up window will display.
NOTE: Completing Milestones is not required and they can be completed in any order.



You will be prompted to schedule the Task or Appointment necessary to complete this milestone if it has not been completed yet.

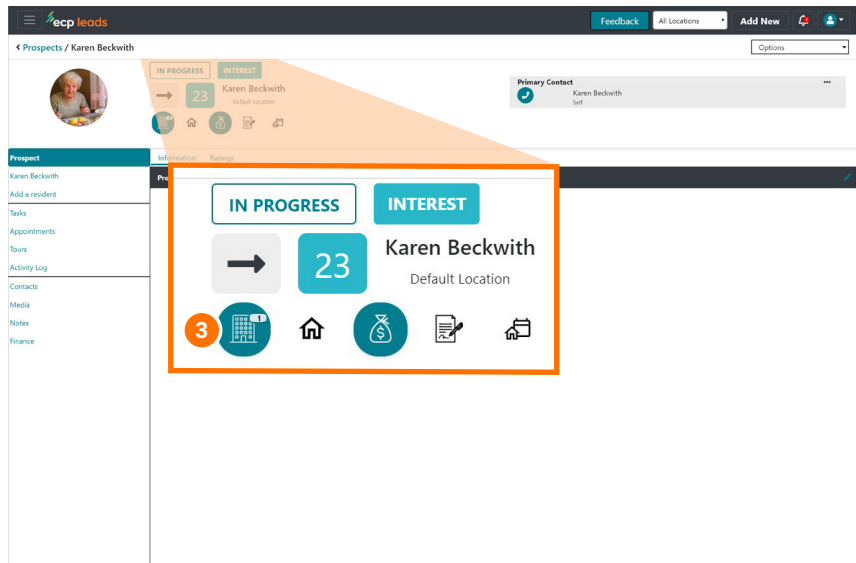
- 2 Click the **Button** to schedule an Appointment or add a Task. The Appointment or Task pop-up window will display. Follow the same process for adding an Appointment or a Task for a Lead. See page 20.



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- 3 Completed Milestone icons display in blue.

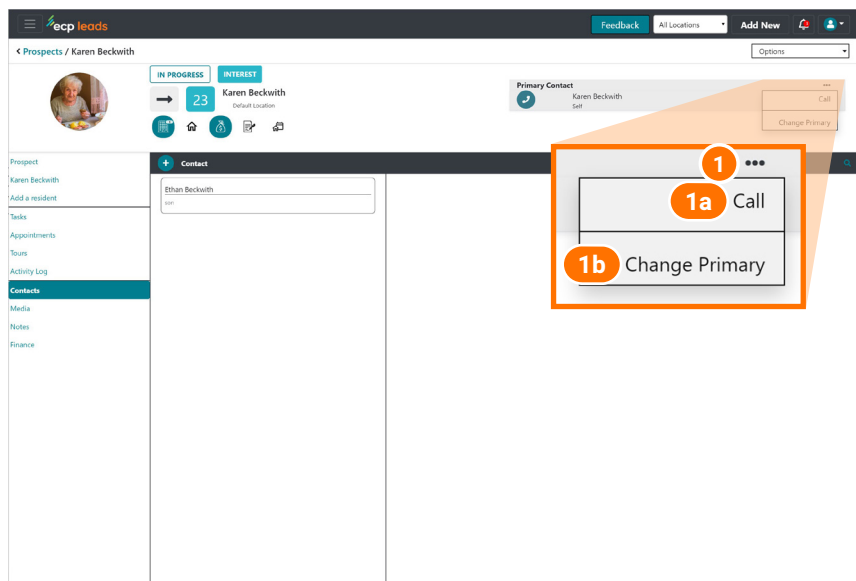


Call a Primary Contact

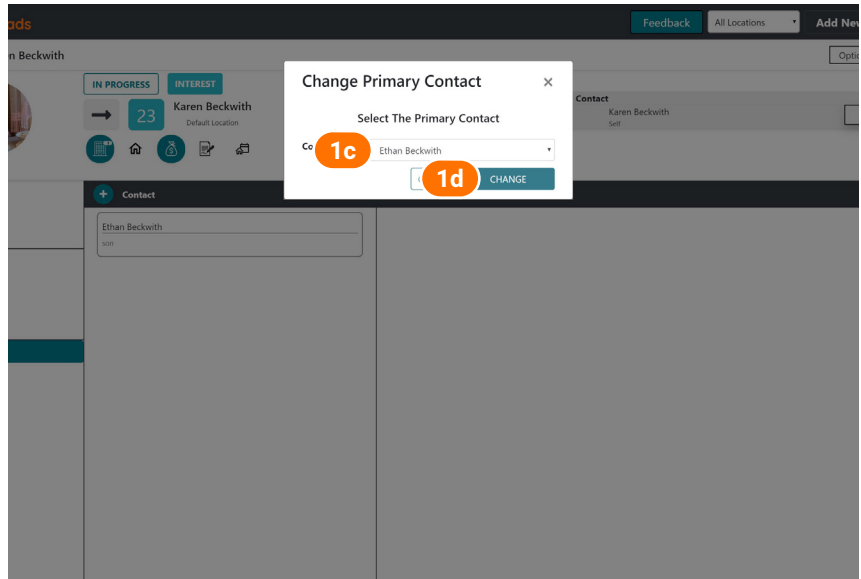
- 1 Click the **More Menu**.
- 1a Select **Call** from the dropdown list. The Complete Phone Call pop-up window will display. Follow the same process for completing a phone call for a Lead. See page 15.

Change a Primary Contact

- 1b Select **Change Primary** from the dropdown list. The Change Primary Contact pop-up window will display.



- 1c** Select a **Contact** from the dropdown list.
- 1d** Click **Change**.

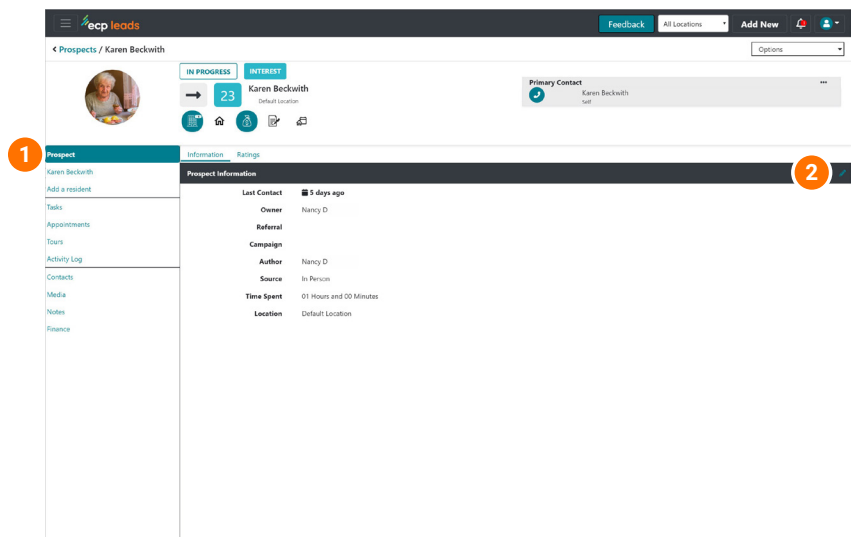


Add Administrative Information

- 1** On the Prospect menu, click **Prospect**.

Information Tab

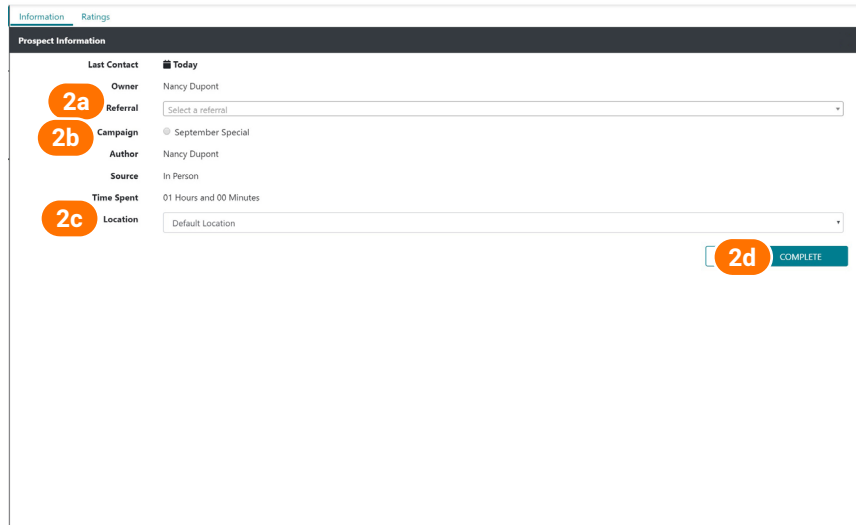
- 2** Click the  (Edit icon) to make changes. The editable form fields will display.



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- 2a** Select a **Referral Name** from the dropdown list or select **Add a new referral**. The Add new Referral pop-up window will display. See page 19 for more details on adding a referral.
- 2b** Click the **Button** to select a campaign if applicable.
- 2c** Select a **Location** from the dropdown list.
- 2d** Click **Complete**.



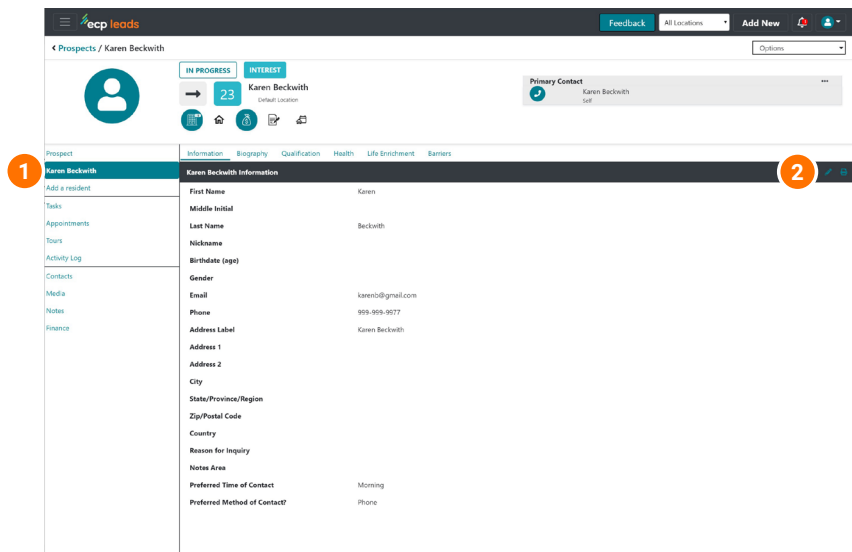
Add Basic Information

- 1** On the Prospect menu, click the **Prospect** name.

Information Tab

- 2** Click the  (Edit icon) to add or edit resident information. The resident questionnaire will display.

TIP: Click the  print icon to print a paper copy or save as a PDF.



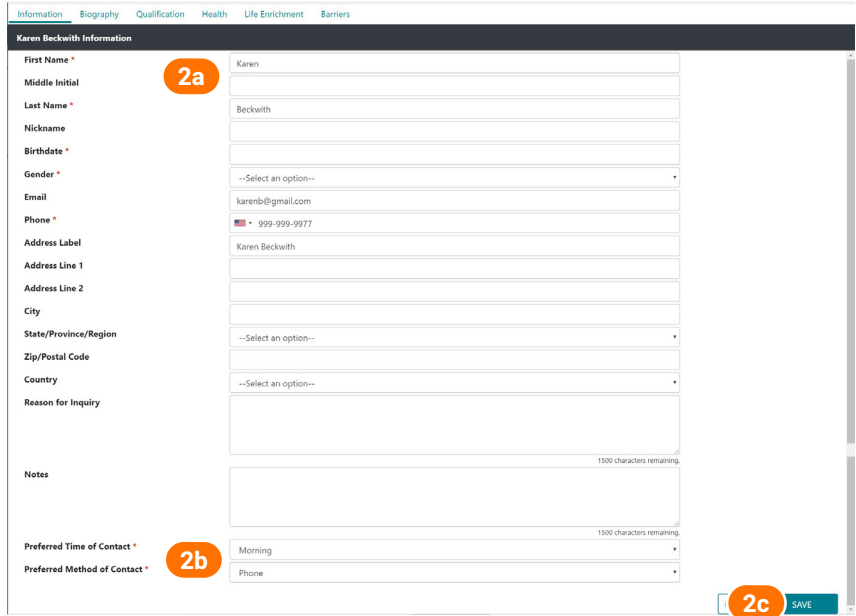

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2a Enter or edit information in the text fields (**First Name, Last Name, Birthdate, Email, Phone, Notes**).

2b Select **Preferred Time** and **Method of Contact** from the dropdown lists.

2c Click **Save**.



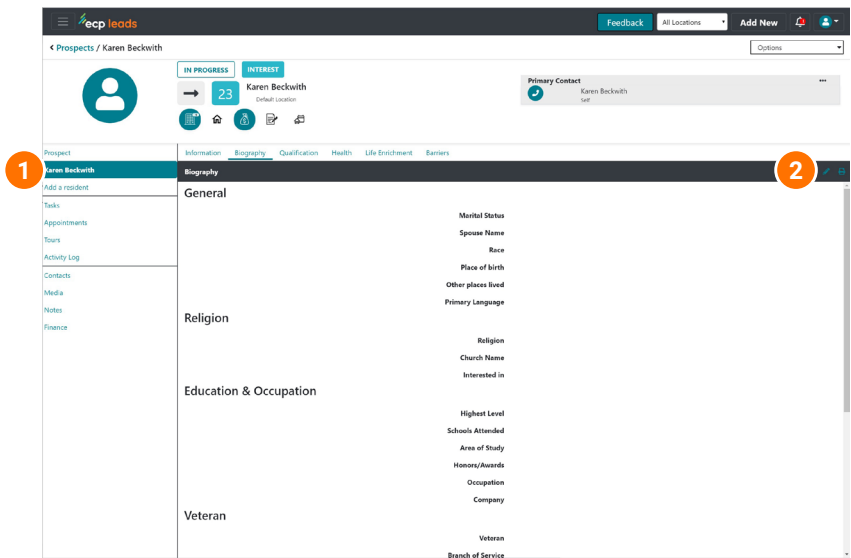
Add Biological Information

1 On the Prospect menu, click the **Prospect Name**.

Biography Tab

2 Click the  (Edit icon). The biography questionnaire will display.

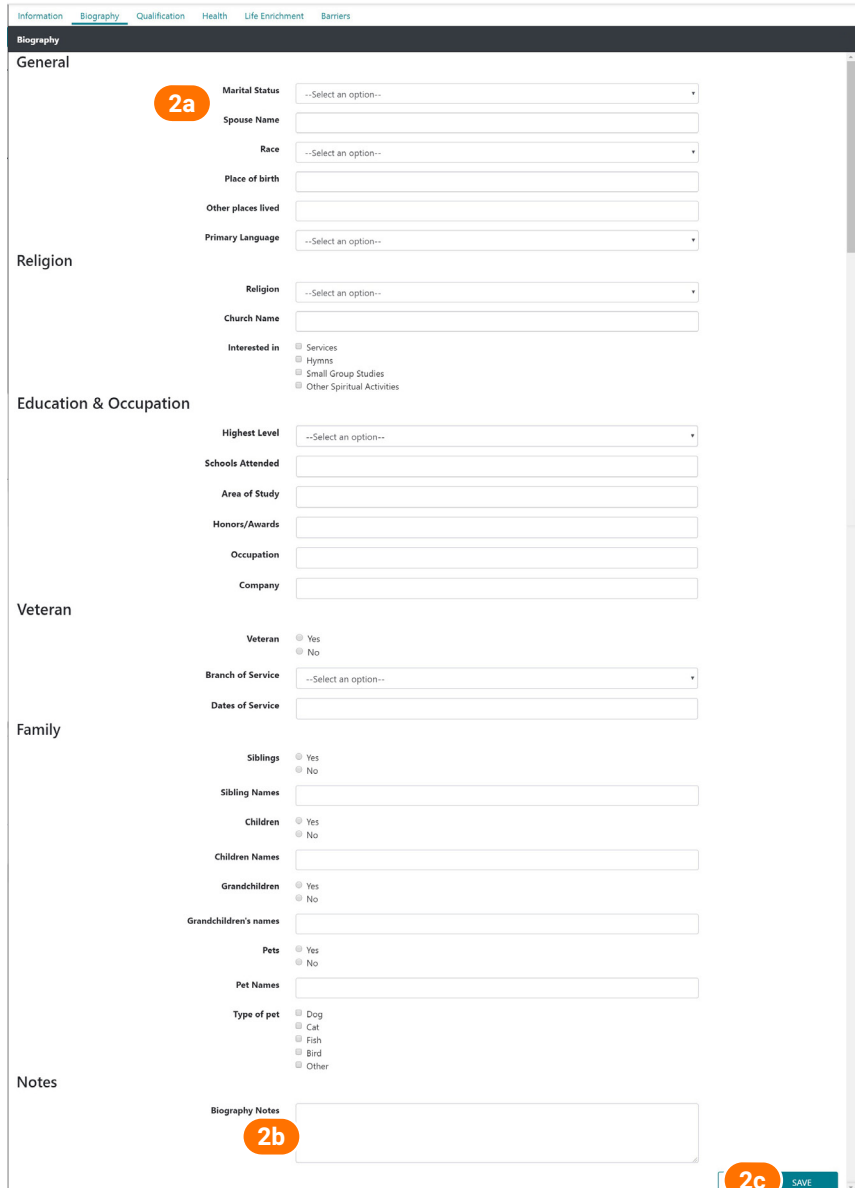
TIP: Click the  print icon to print a paper copy or save as a PDF.




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2a Enter or edit information for the **General, Religion, Education & Occupation, Veteran, and Family** categories.



The screenshot shows the Biography form with the following sections and fields:

- General:** Marital Status (dropdown), Spouse Name (text), Race (dropdown), Place of birth (text), Other places lived (text), Primary Language (dropdown).
- Religion:** Religion (dropdown), Church Name (text), Interested in (checkboxes for Services, Hymns, Small Group Studies, Other Spiritual Activities).
- Education & Occupation:** Highest Level (dropdown), Schools Attended (text), Area of Study (text), Honors/Awards (text), Occupation (text), Company (text).
- Veteran:** Veteran (radio buttons for Yes/No), Branch of Service (dropdown), Dates of Service (text).
- Family:** Siblings (radio buttons for Yes/No), Sibling Names (text), Children (radio buttons for Yes/No), Children Names (text), Grandchildren (radio buttons for Yes/No), Grandchildren's names (text), Pets (radio buttons for Yes/No), Pet Names (text), Type of pet (checkboxes for Dog, Cat, Fish, Bird, Other).
- Notes:** Biography Notes (text area).

Callouts: **2a** points to the General section; **2b** points to the Biography Notes field; **2c** points to the SAVE button.

2b Enter **Notes** in the paragraph field.

2c Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.



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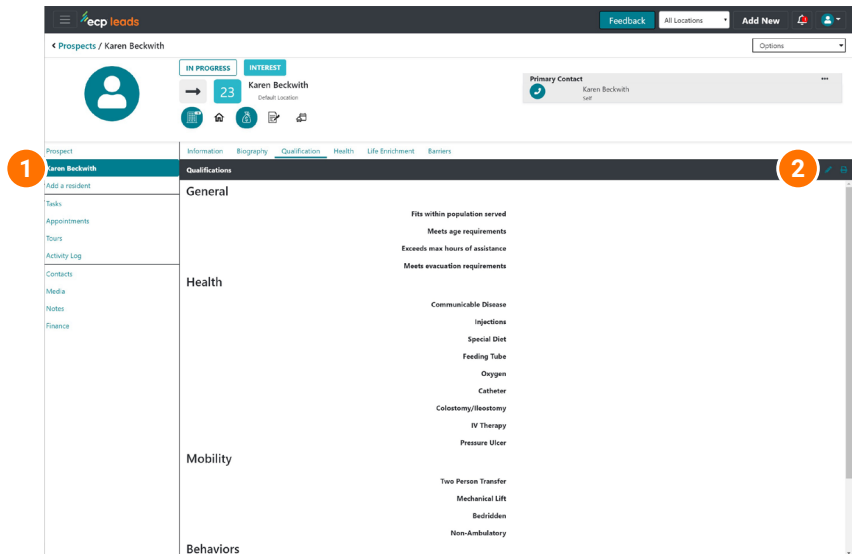
Add Qualifications

- 1 On the Prospect menu, click the **Prospect Name**.

Qualification Tab

- 2 Click the  (Edit icon). The Qualification Questionnaire will display.

TIP: Click the  print icon to print a paper copy or save as a PDF.



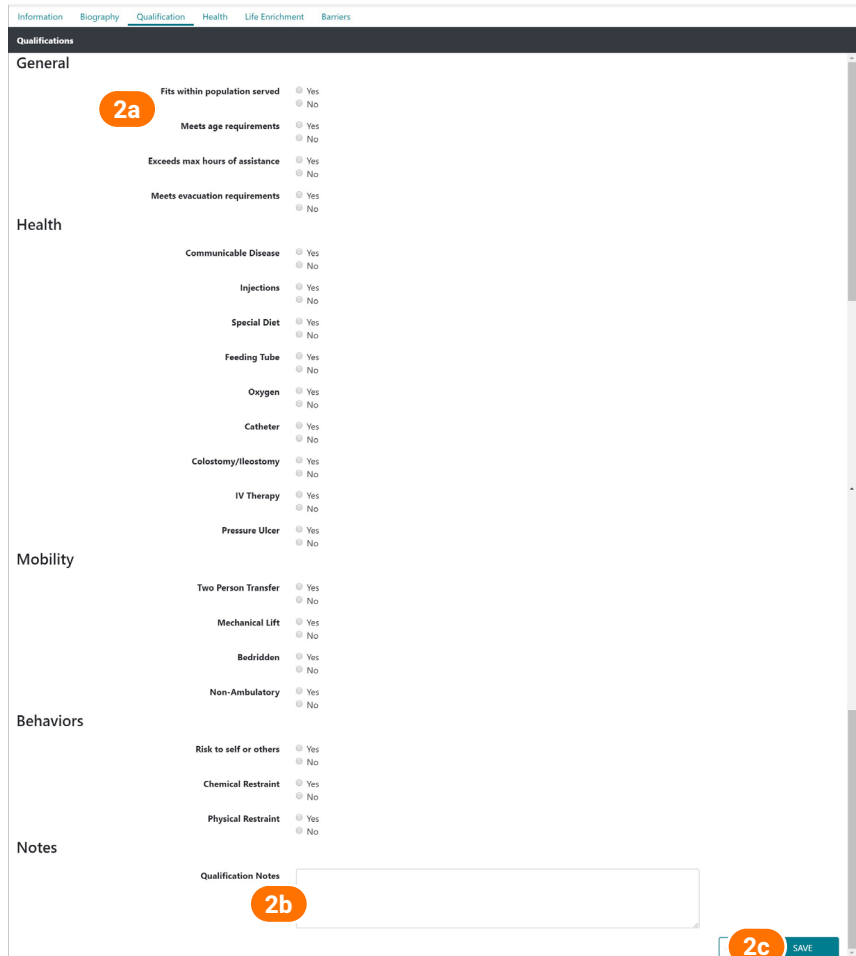

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2a Click **Yes** or **No** buttons to answer questions in the General, Health, Mobility, Behaviors, and Finance categories.

2b Enter **Notes** in the paragraph field.

2c Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.



Information Biography **Qualification** Health Life Enrichment Barriers

Qualifications

General

2a Fits within population served ☐ Yes ☐ No

Meets age requirements ☐ Yes ☐ No

Exceeds max hours of assistance ☐ Yes ☐ No

Meets evacuation requirements ☐ Yes ☐ No

Health

Communicable Disease ☐ Yes ☐ No

Injections ☐ Yes ☐ No

Special Diet ☐ Yes ☐ No

Feeding Tube ☐ Yes ☐ No

Oxygen ☐ Yes ☐ No

Catheter ☐ Yes ☐ No

Colostomy/Ileostomy ☐ Yes ☐ No

IV Therapy ☐ Yes ☐ No

Pressure Ulcer ☐ Yes ☐ No

Mobility

Two Person Transfer ☐ Yes ☐ No

Mechanical Lift ☐ Yes ☐ No

Bedridden ☐ Yes ☐ No

Non-Ambulatory ☐ Yes ☐ No

Behaviors

Risk to self or others ☐ Yes ☐ No

Chemical Restraint ☐ Yes ☐ No

Physical Restraint ☐ Yes ☐ No

Notes

Qualification Notes **2b**

2c **SAVE**



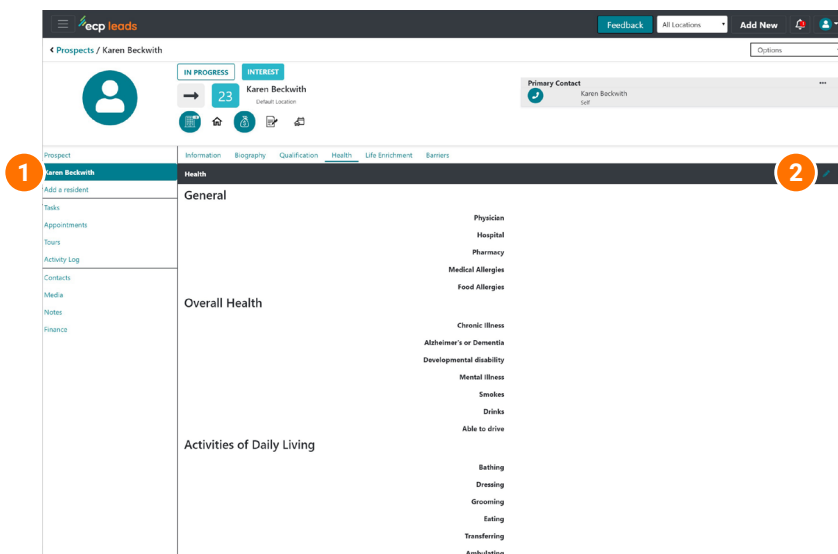
Add Health Information

- 1 On the Prospect menu, click the **Prospect Name**.

Health Tab

- 2 Click the  (Edit icon) The Health Questionnaire will display.

TIP: Click the  print icon to print a paper copy or save as a PDF.




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2a Enter or edit information for the **General, Overall Health, Activities of Daily Living,** and **Additional Services** categories.

Information
Biography
Qualification
Health
Life Enrichment
Barriers

Health

General

2a

Physician
Hospital
Pharmacy
Medical Allergies
Food Allergies

Overall Health

Chronic Illness

Alzheimer's or Dementia

Developmental disability

Mental Illness

Smokes

Drinks

Able to drive

Activities of Daily Living

Bathing

Dressing

Grooming

Eating

Transferring

Ambulating

Toileting

Incontinent

Additional Services

Medication Administration

Appointment Scheduling

Housekeeping

Laundry

Transportation

Home Health

Therapy

Hospice

Notes

Health Notes

2b

2c SAVE

2b Enter **Notes** in the paragraph field.

2c Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.



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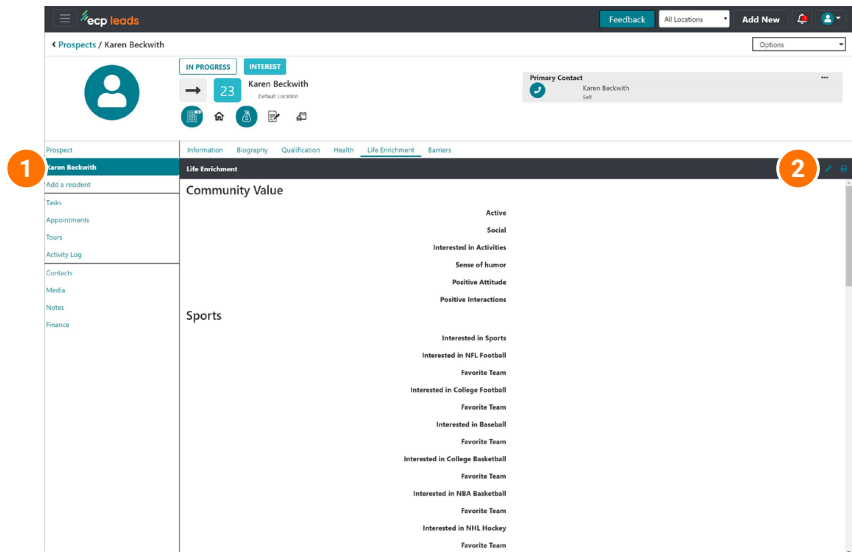
Add Life Enrichment Information

- 1 On the Prospect menu, click the **Prospect Name**.

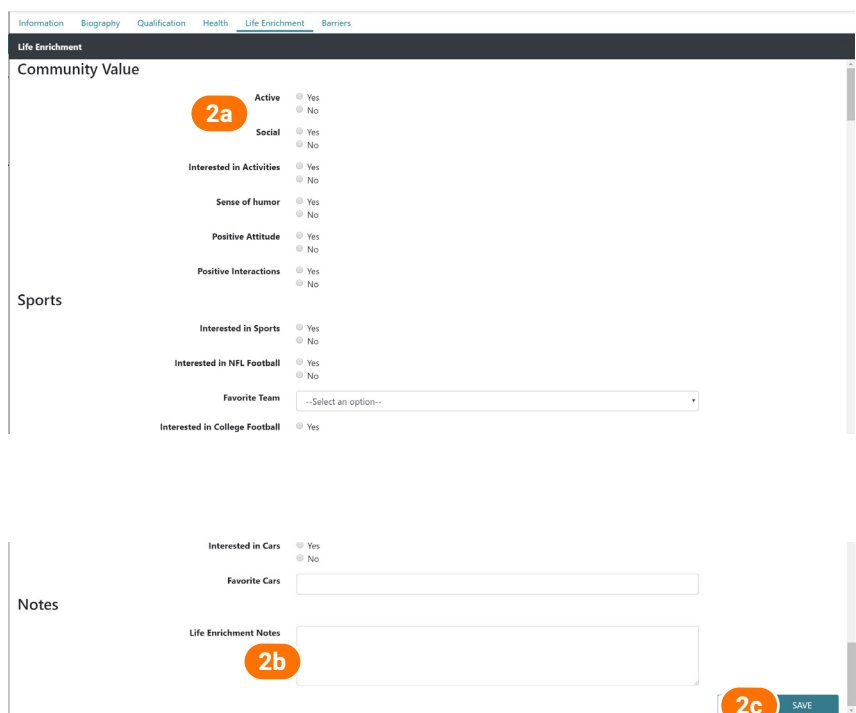
Life Enrichment Tab

- 2 Click the  (Edit icon). The Life Enrichment Questionnaire will display.

TIP: Click the  print icon to print a paper copy or save as a PDF.



- 2a Enter or edit details in the **Community Value, Sports, Music, Entertainment, Reading, Cooking and Baking, Arts and Crafts, Games, Exercise, Outdoor Activities, Collecting, Travel, and Cars** categories.



- 2b Enter **Notes** in the paragraph field.
- 2c Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.



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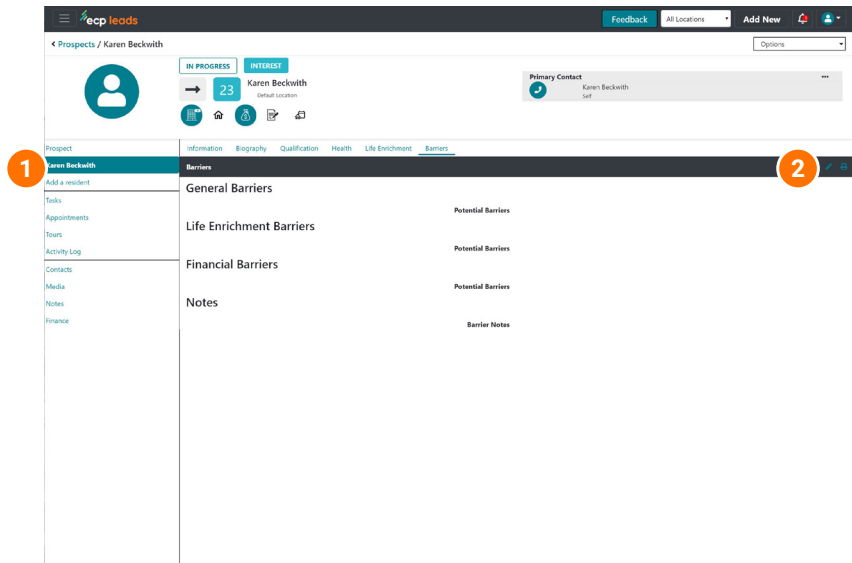
Add Barriers Information

- 1 On the Prospect menu, click the **Prospect Name**.

Barriers Tab

- 2 Click the  (Edit icon). The Barriers Questionnaire will display.

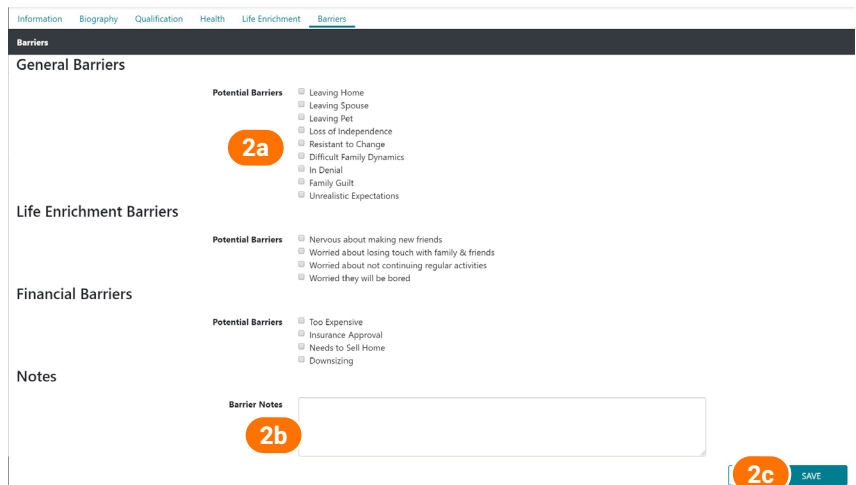
TIP: Click the  print icon to print a paper copy or save as a PDF.



- 2a Click the **Checkboxes** to mark potential barriers in **General, Life Enrichment, and Financial** categories.

- 2b Enter **Notes** in the paragraph field.

- 2c Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.

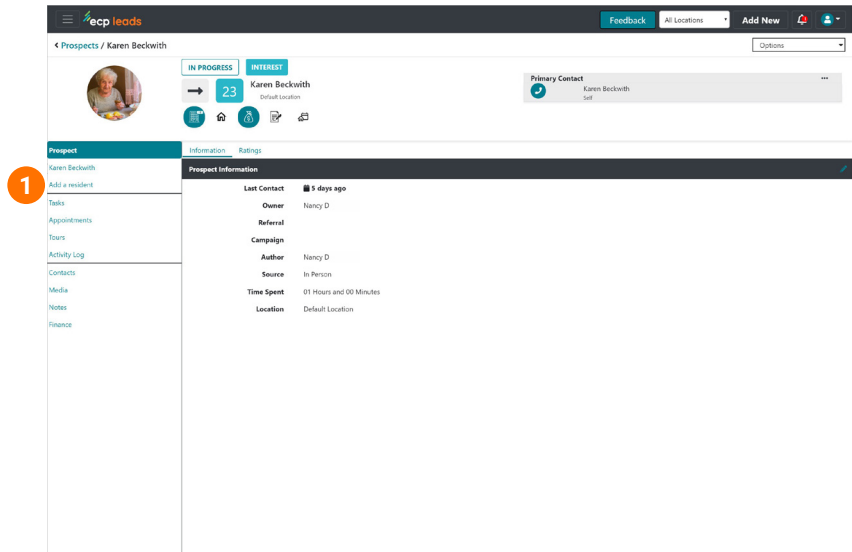



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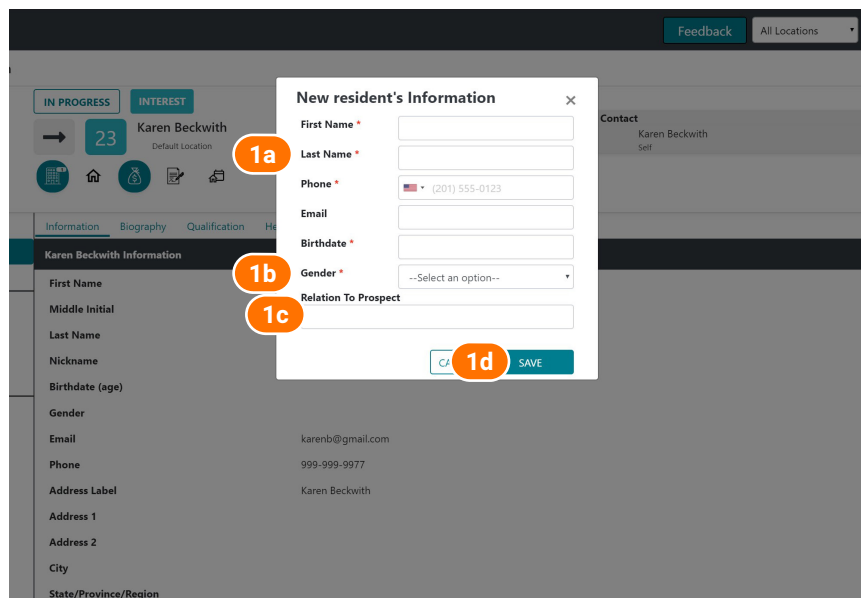
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Add a Resident

- 1 On the Prospect menu, click **Add a Resident**. The New Resident's Information pop-up will display.

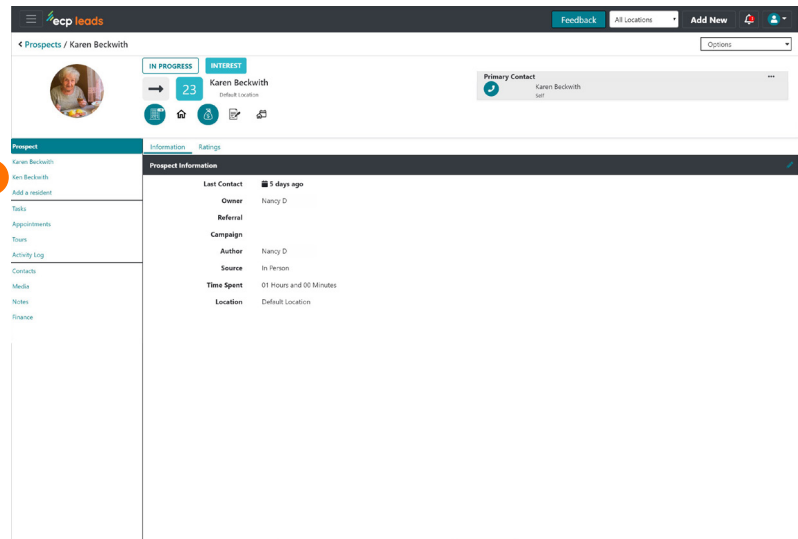


- 1a Enter **First Name, Last Name, Phone, Email** and **Birthdate** in the text fields.
- 1b Select **Gender** from the dropdown list.
- 1c Enter **Relation to Prospect** in the text field.
- 1d Click **Save**.



1e The New Resident Name will display in the Prospect menu. Click the **Name** to enter or edit details. See page 38.

1e



Tasks

1 On the Prospect menu, click **Tasks**. All Tasks display by default.

2 Click a **Task** tab (**All**, **Current**, **Pending**, **Completed**, **Cancelled**) to filter by that status.

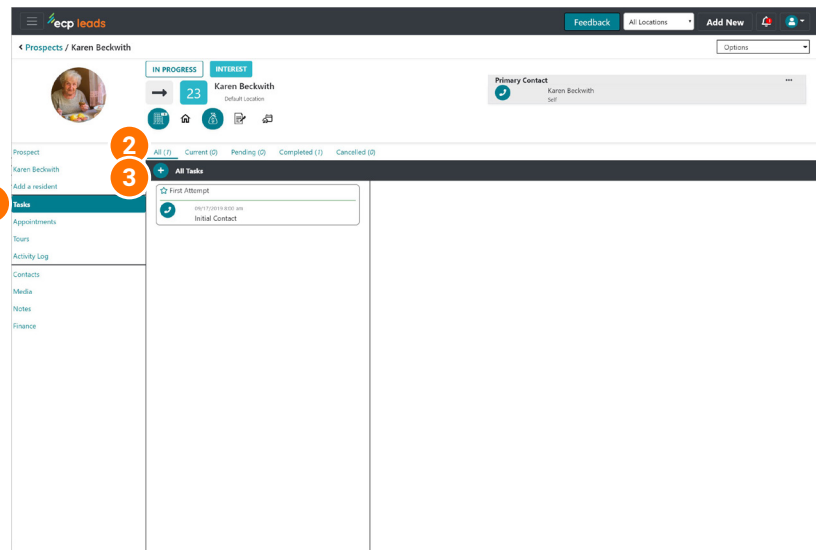
Add a Task

3 Click the **+** (Plus sign). The Add Task pop-up window will display. Follow the same process for adding a Task to a Lead. See page 24.

1

2

3

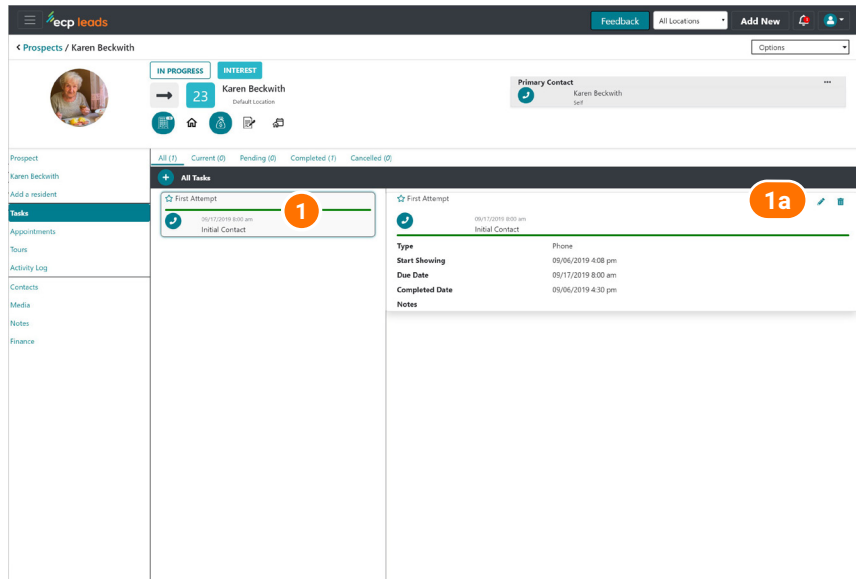



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Edit a Task

- 1 Click a **Task block**. The Task details will display.
- 1a Click the  (Edit icon) to edit the details. Click the trash can icon to delete the Task. Follow same process as editing or deleting a task on a Lead. see page 26.

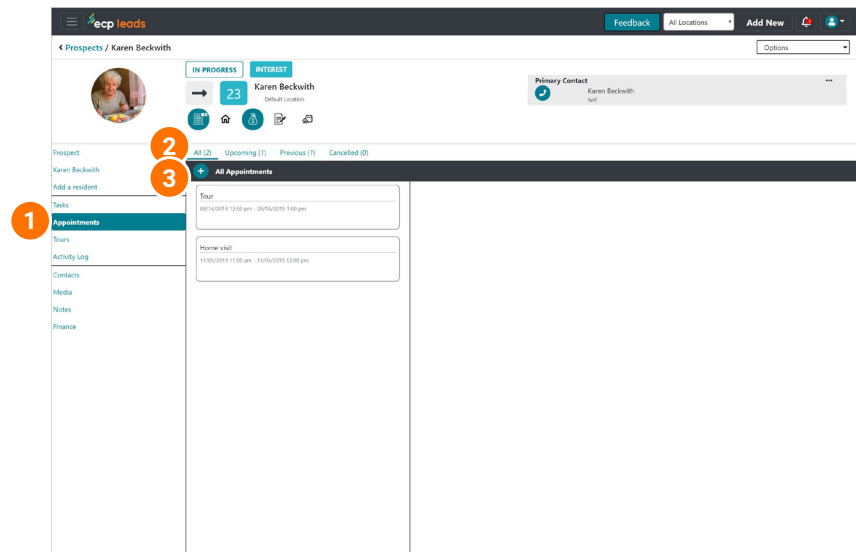


Appointments

- 1 In the Prospect menu, click **Appointments**. All Appointments display by default.
- 2 Click an **Appointment tab (All, Upcoming, Previous, Cancelled)** to filter by that status.

Add an Appointment

- 3 Click the  (Plus sign). The Add an Appointment pop-up window will display. Follow the same process for adding an Appointment to a Lead. See page 20.

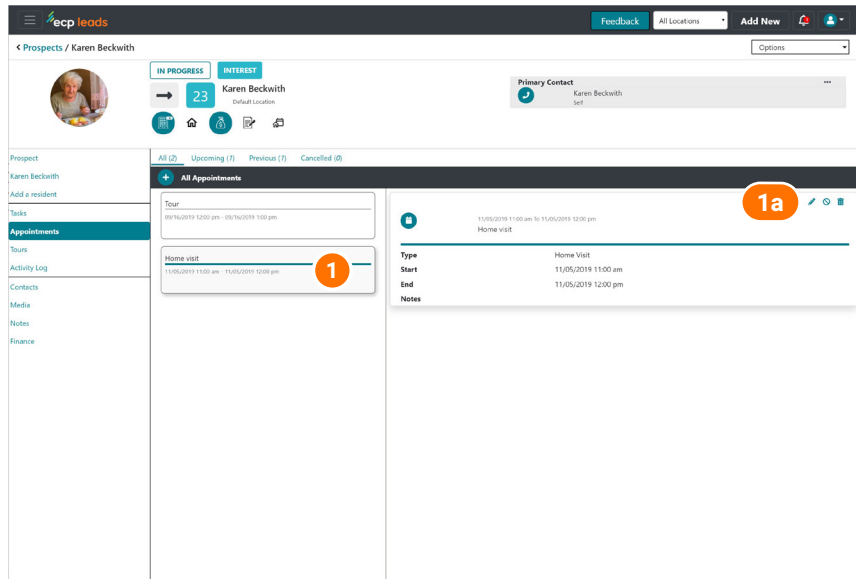


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Edit an Appointment

- 1 Click an **Appointment block**. The details will display.
- 1a Click the  (Edit icon) to edit details.
Click the  (Cancel icon) to cancel the appointment.
Click the  (Delete icon) to delete the appointment.
Follow the same process for editing, cancelling, or deleting an Appointment for a Lead. See pages 22-24.



Tours

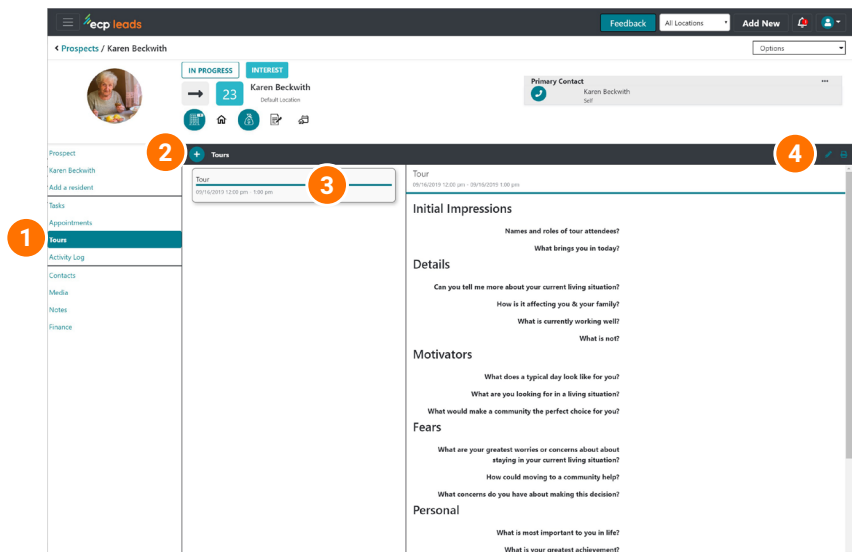
Schedule a Tour

- 1 On the Prospect menu, click **Tours**. All Tours will display.
- 2 Click the  (Plus sign). The Add an Appointment pop-up window will display. Follow the same process for adding an Appointment to a Lead. See page 20.

TIP: Click the  print icon to print a paper copy or save as a PDF.

Document Tour Observations

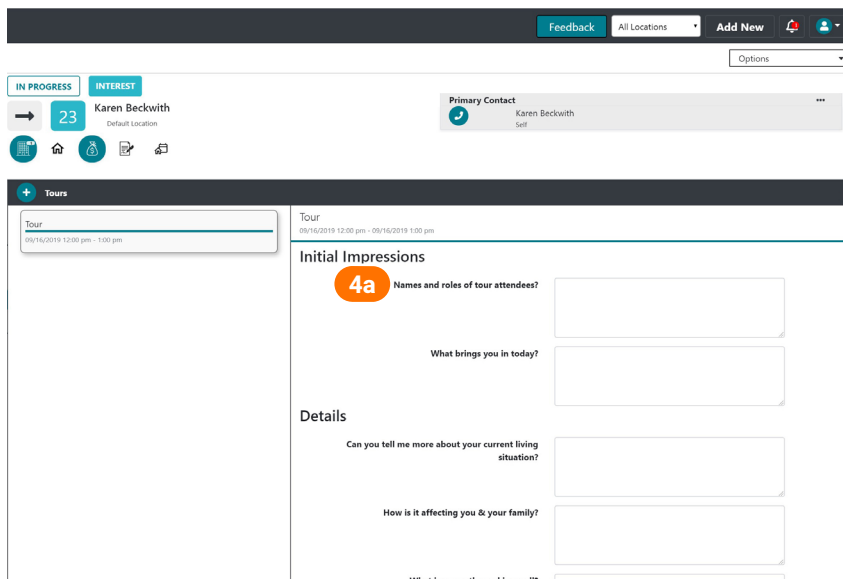
- 3 Click a **Tour Block**. The Tour Questionnaire will display.
- 4 Click the  (Edit icon). The answer fields will display.



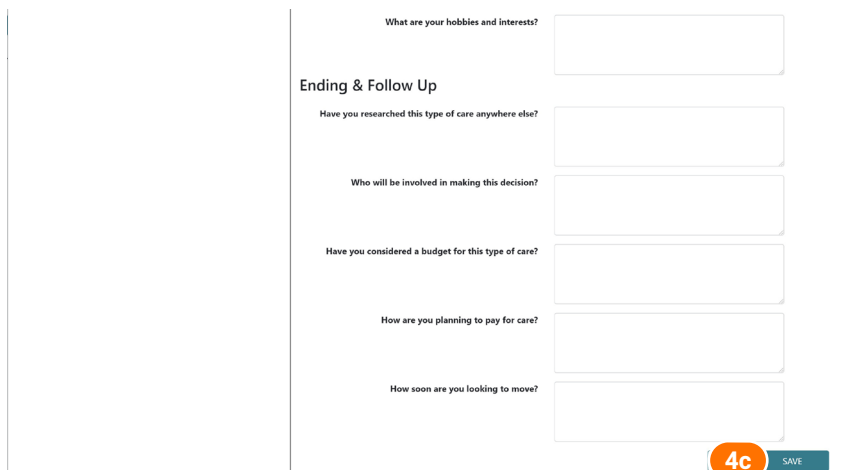
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4a Enter answers to questions in the **Initial Impressions, Details, Motivators, Fears, Personal, and Ending and Followup** categories.

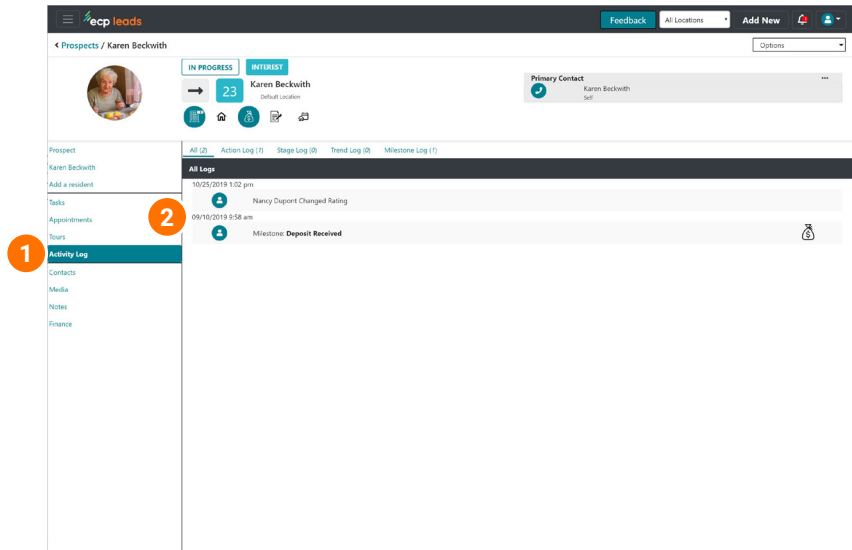


4c Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.



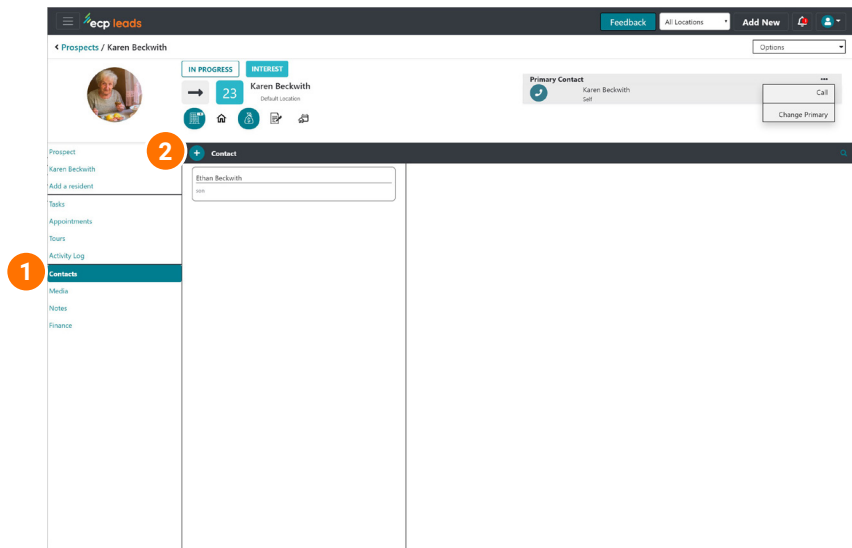

Activity Log

- 1 On the Prospect menu, click **Activity Log**. The timeline of major events that have occurred for the Prospect.
- 2 Examples of log entries are:
 - Status Change
 - Stage Change
 - Trend Change
 - Milestone Met



Add a Contact

- 1 On the Prospect menu, click **Contacts**. The list of contacts will display.
- 2 Click the **+** (Plus sign). The Add New Contact pop-up window will display.



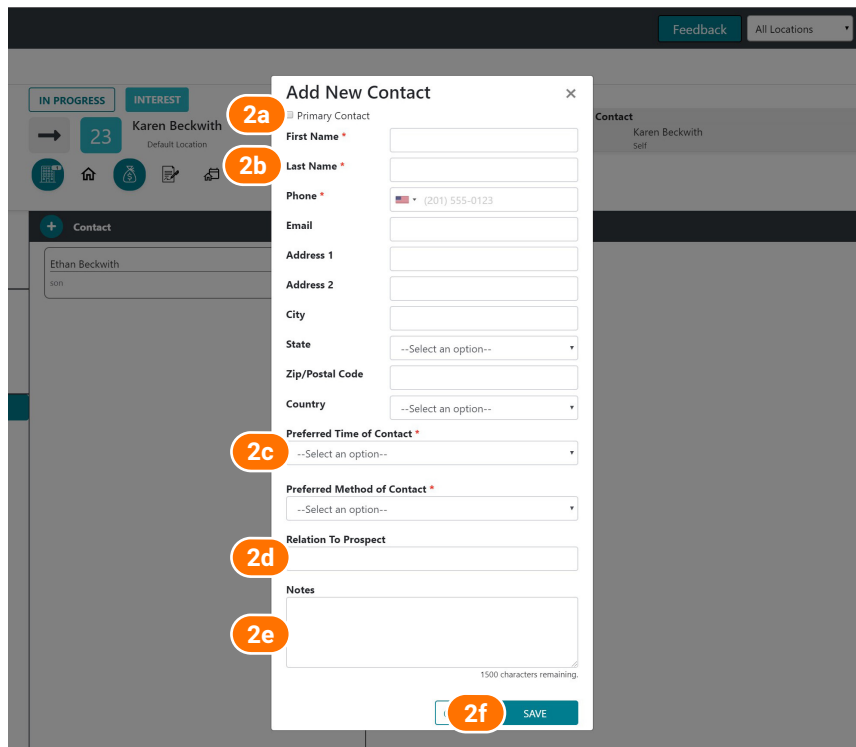
TIP: Click the  Search icon to search for a specific contact. Enter the name in the text field.



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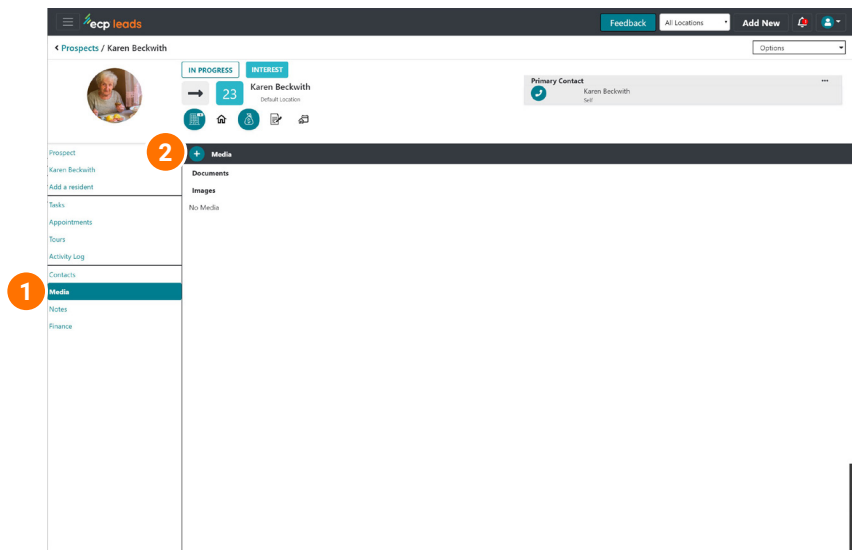
- 2a** Click the **Checkbox** if this is the Primary Contact.
- 2b** Enter **First Name**, **Last Name**, and **Phone** in the text fields.
- 2c** Select **Preferred Time** and **Method of Contact** from the dropdown lists.
- 2d** Enter **Relation to Prospect** in the text field.
- 2e** Enter **Notes** in the paragraph field.
- 2f** Click **Save**.



Add Media to a Prospect

Store documents and images specific to the Prospect here.

- 1** On the Prospect menu, click **Media**. The library of Documents and Images will display.
- 2** Click the **+** (Plus sign). The Upload Files pop-up window will display. Follow the same process as adding a profile photo. See page 38.



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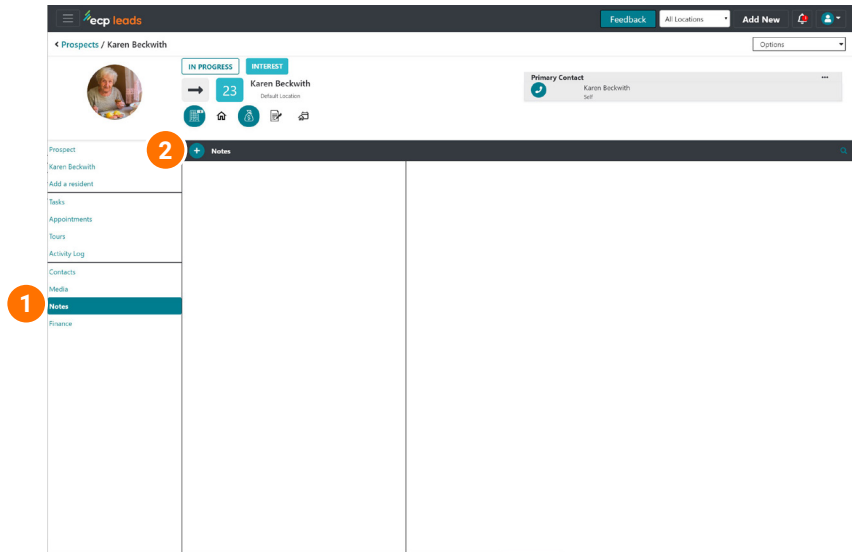
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Add a Note

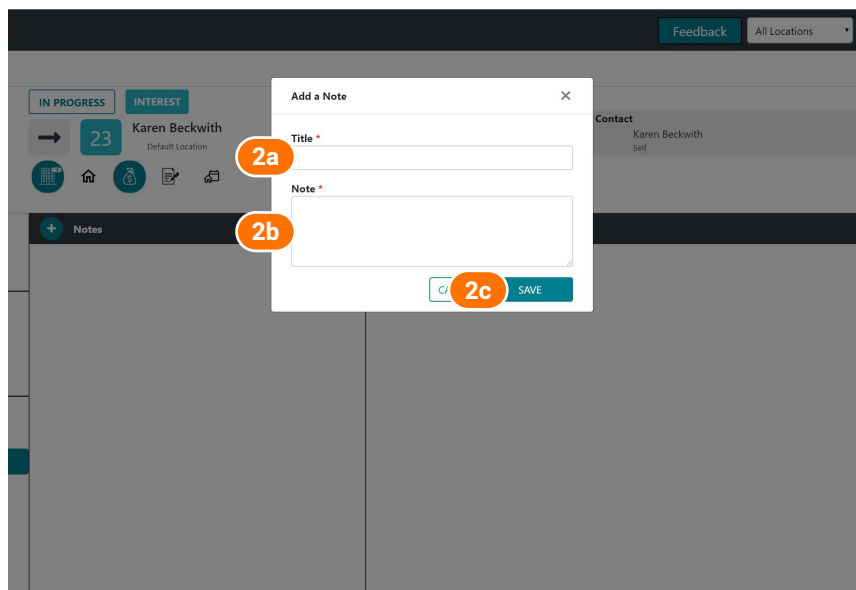
Use this section for general notes not tied to a specific Task.

- 1 On the Prospect menu, click **Notes**. The list of Notes will display.
- 2 Click the **+** (Plus sign) to add a note. The Add a Note pop-up window will display.

TIP: Click the  Search icon to search for a specific contact. Enter the name in the text field.

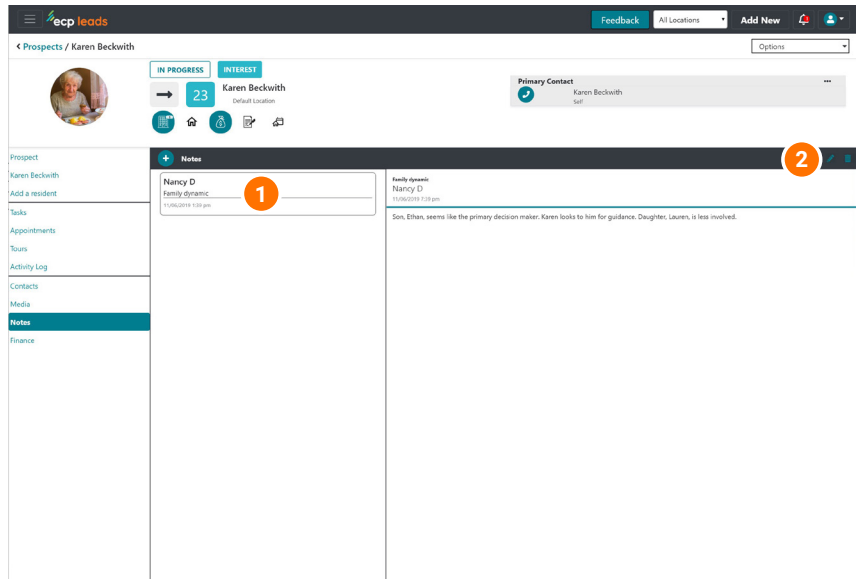


- 2a Enter a **Title** for the note.
- 2b Enter the body of the note in the paragraph field.
- 2c Click **Save**.

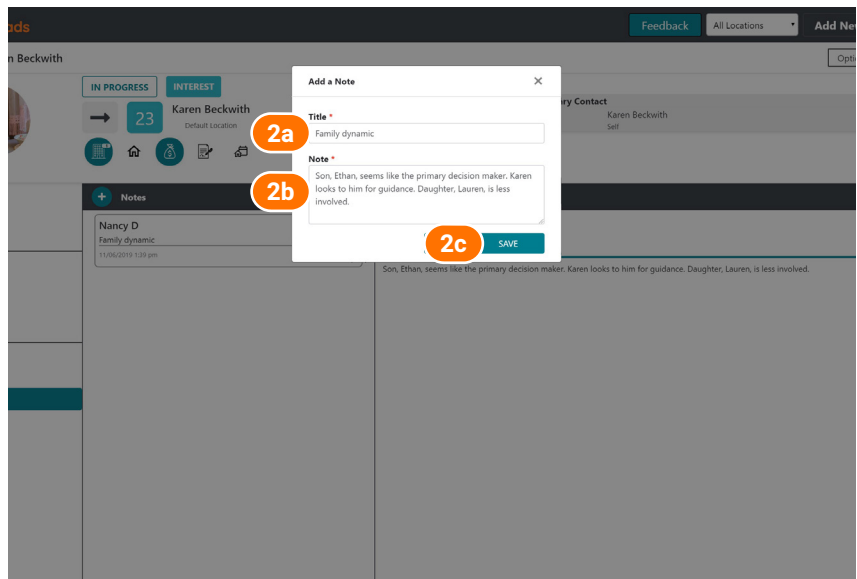


Edit a Note

- 1 Click a **Note** block. The Note details will display.
- 2 Click the  (Edit icon). The Add a Note pop-up window will display.

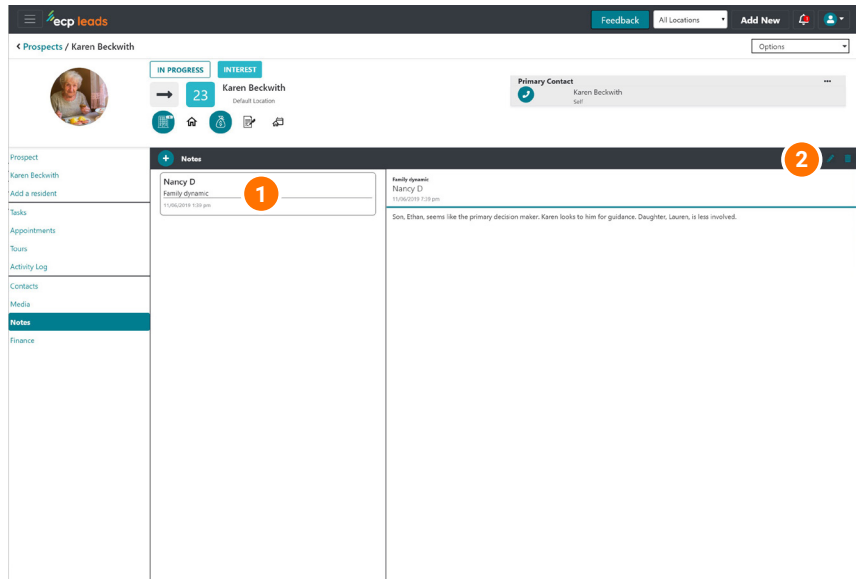


- 2a Edit the **Title**.
- 2b Edit the body of the Note.
- 2c Click **Save**.

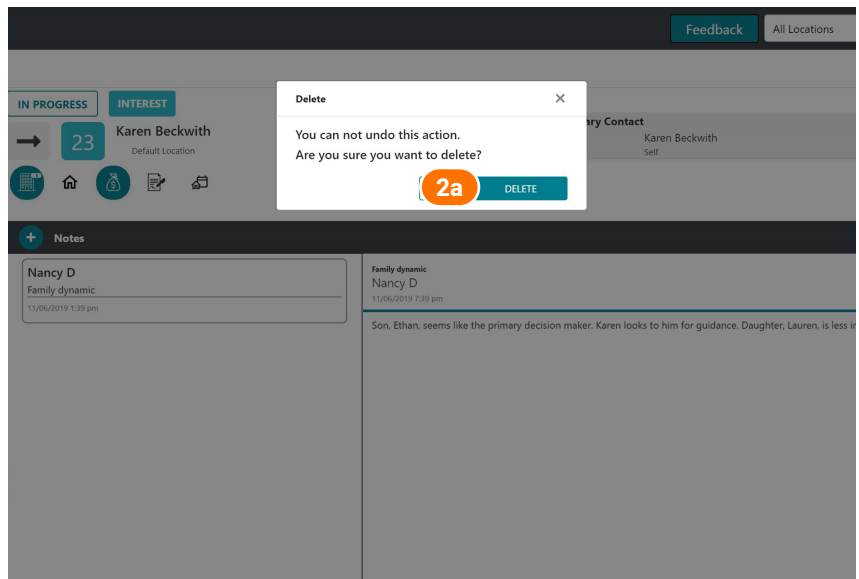


Delete a Note

- 1 Click a **Note** block. The Note details will display.
- 2 Click the  (Delete icon). The Delete pop-up window will display.



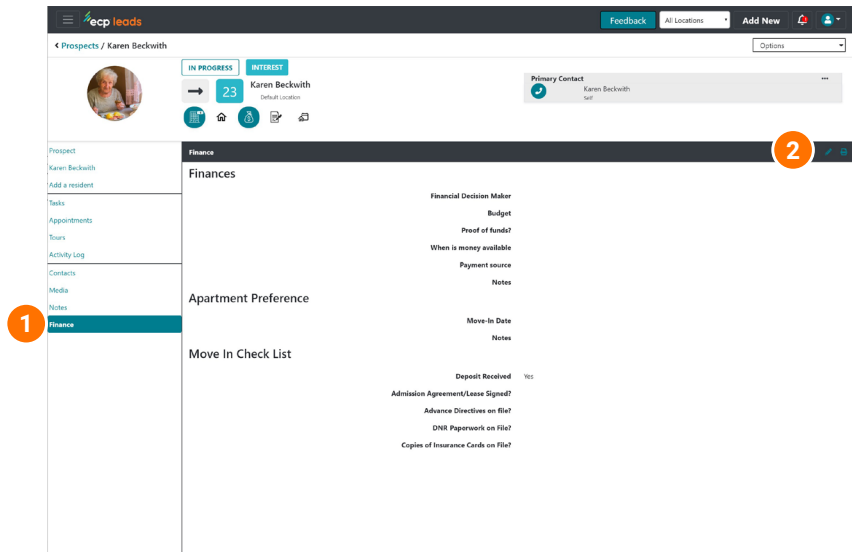
- 2a Click **Delete**.
NOTE: You cannot undo this action.



Add Financial Information

- 1 On the Prospect menu, click **Finance**. The Finances window will display.
- 2 Click the  (Edit icon) to add financial details. The Finances Questionnaire will display.

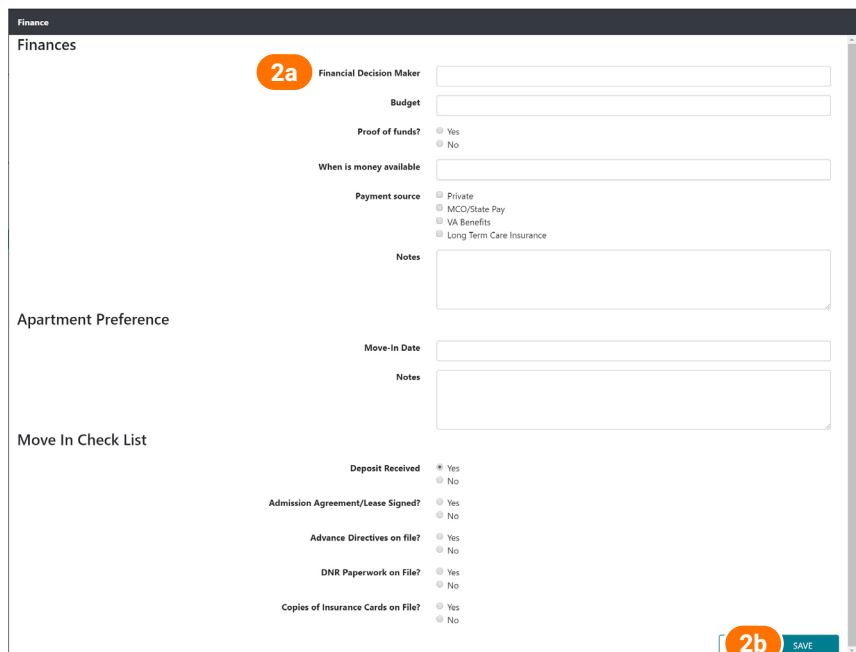
TIP: Click the  print icon to print a paper copy or save as a PDF.



The screenshot shows the ecp leads interface. At the top, there's a navigation bar with 'Feedback', 'All Locations', 'Add New', and a user profile. Below this, the 'Prospects / Karen Beckwith' section is visible. On the left, a sidebar menu lists various options: Prospect, Karen Beckwith, Add a resident, Tasks, Appointments, Tours, Activity Log, Contacts, Media, Notes, and Finance. The 'Finance' option is highlighted with a blue bar and a red circle labeled '1'. The main content area shows the 'Finances' window, which includes sections for 'Financial Decision Maker', 'Budget', 'Proof of funds?', 'When is money available', 'Payment source', 'Notes', 'Apartment Preference', 'Move-In Date', 'Move In Check List', 'Deposit Received', 'Admission Agreement/Lease Signed?', 'Advance Directives on file?', 'DNR Paperwork on file?', and 'Copies of Insurance Cards on file?'. A red circle labeled '2' is placed over the 'Edit' icon (a pencil) in the top right corner of the 'Finances' window.

- 2a Enter or edit information in the **Finances**, **Apartment Preference**, and **Move In Check List** categories.

- 2b Click **Save** to save your entries or click **Cancel** to go back to view-only page without saving.

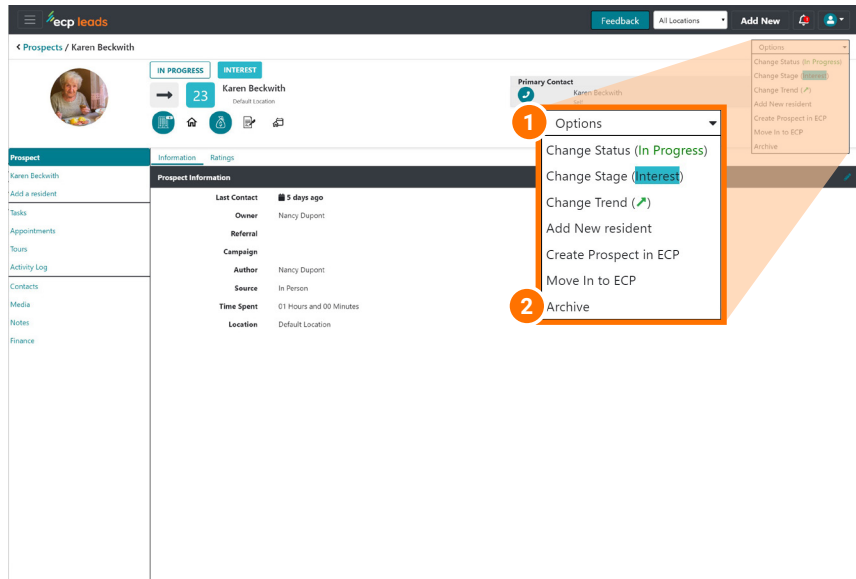


This screenshot shows the 'Finances' section of the ecp leads interface. It contains several input fields and checkboxes for data entry. The 'Financial Decision Maker' field is at the top, followed by 'Budget'. Below these are 'Proof of funds?' and 'When is money available', each with radio button options for 'Yes' and 'No'. The 'Payment source' section includes checkboxes for 'Private', 'MCO/State Pay', 'VA Benefits', and 'Long Term Care Insurance'. There are two 'Notes' text areas. The 'Apartment Preference' section has a 'Move-In Date' field and another 'Notes' text area. The 'Move In Check List' section contains several checkboxes: 'Deposit Received', 'Admission Agreement/Lease Signed?', 'Advance Directives on file?', 'DNR Paperwork on file?', and 'Copies of Insurance Cards on file?'. A red circle labeled '2a' is placed over the 'Financial Decision Maker' field. At the bottom right, there is a 'SAVE' button with a red circle labeled '2b' next to it.

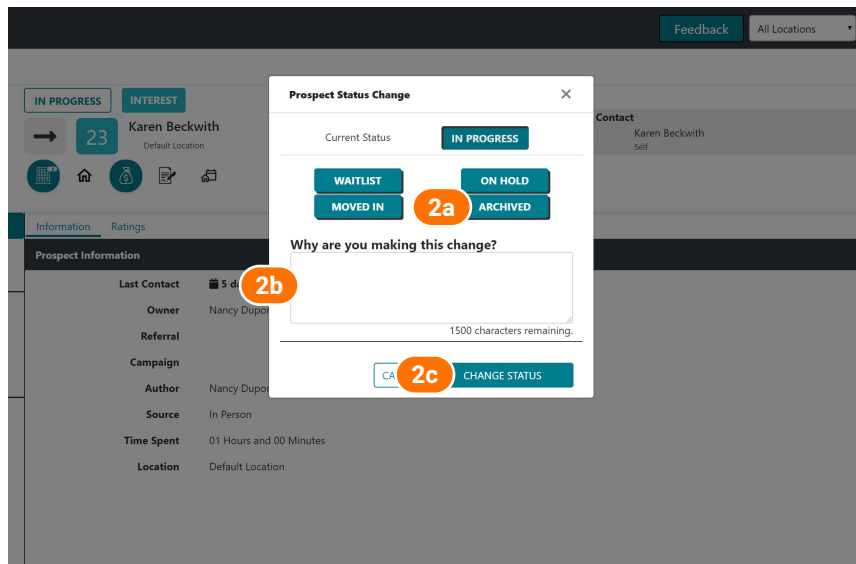


Archive a Prospect

- 1 Click the **Options** menu.
- 2 Select **Archive** from the dropdown list. The Prospect Status Change pop-up window will display.

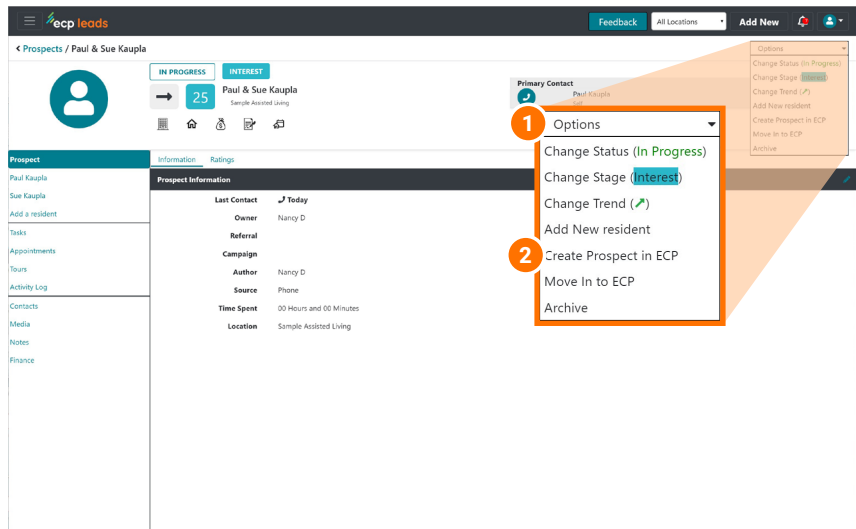


- 2a Click **Archived**.
- 2b Enter the **Reason** for archiving this Prospect in the paragraph field.
- 2c Click **Change Status**.



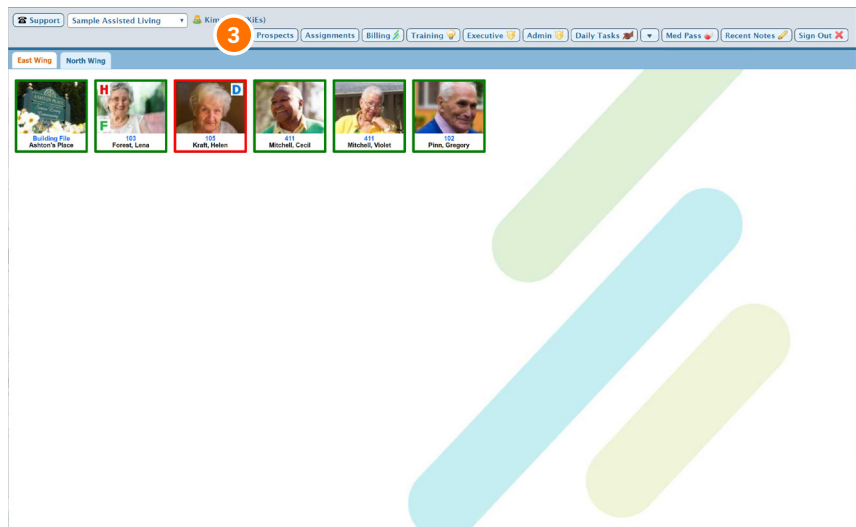
Create Prospect in ECP

- 1 Click the **Options** menu.
- 2 Select **Create Prospect in ECP** from the dropdown list. A confirmation pop-up window will display. Click **Yes**. The Prospect Created window will display. Click **OK** to dismiss. Log in to ECP Web.



In ECP Web

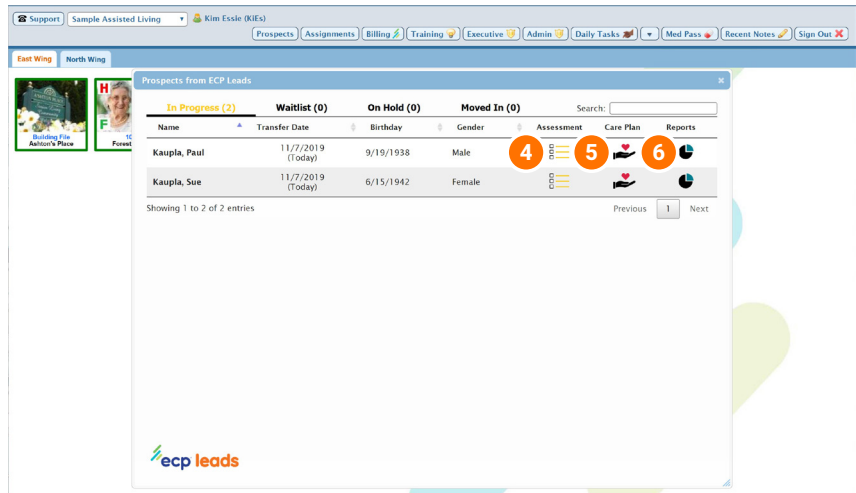
- 3 On the ECP home screen, click **Prospects**. The Prospects from ECP Leads will display.



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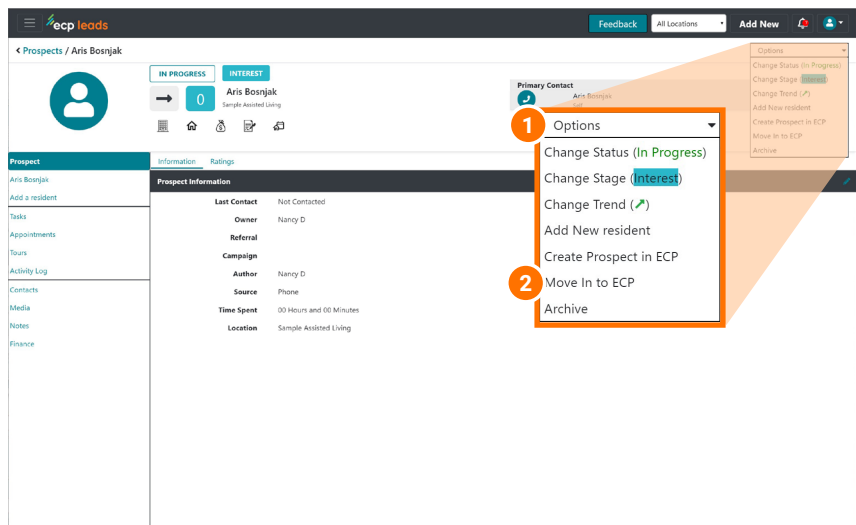
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- 4 Click the  (Assessment icon) to start an Assessment.
- 5 Click the  (Care Plan icon) to create a Care Plan.
- 6 Click the  (Reports icon) to choose a Report.



Move Prospect to ECP

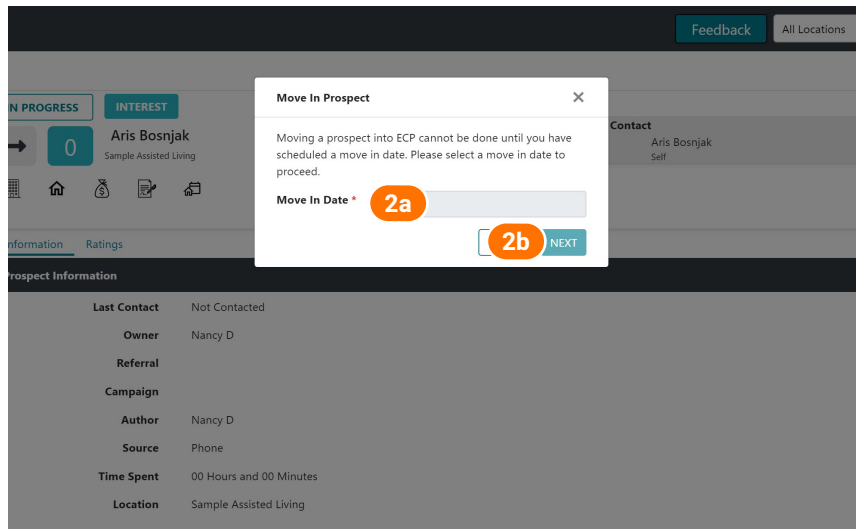
- 1 Click the **Options** menu.
- 2 Select **Move in to ECP** from the dropdown list. If you do not have a move in date scheduled, the Move In Prospect pop-up window will display.



2a Select a **Move in Date** from the date picker.

2b Click **Next**. A confirmation pop-up window will display. Click Move In To ECP.
NOTE: If you have a move in date scheduled, you will skip directly to the confirmation pop-up window.

The Move In Prospect acknowledgement pop-up window will display. Click **OK** to dismiss. Log in to ECP Web.

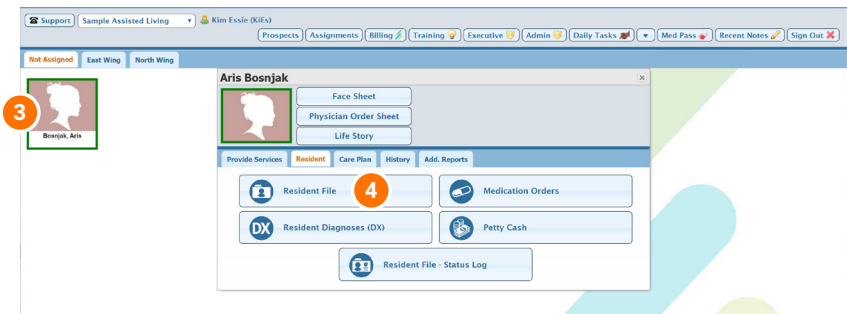


In ECP Web

3 A tile for the new Resident will display on the home screen. Click the **tile**. The Resident window will display.

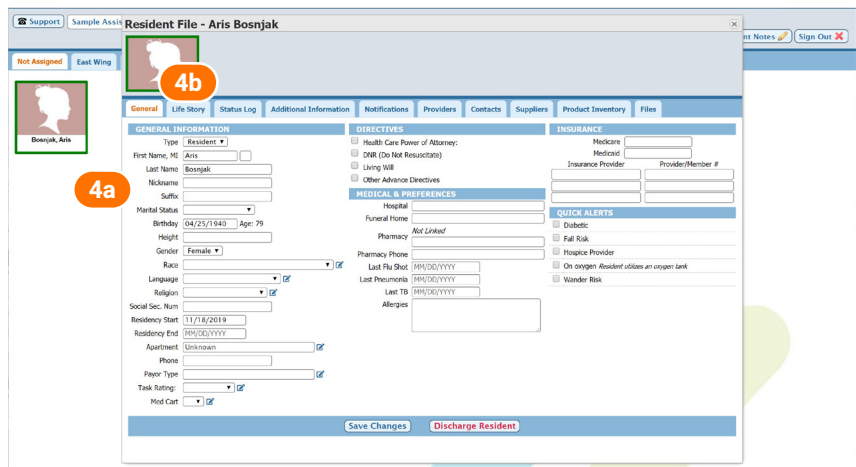
Resident Tab

4 Click **Resident File**. The Resident File will display.



4a On the **General** tab, Resident file information entered in Leads will be repopulated.

4b Click the **Life Story** tab. The Life Story details will display.

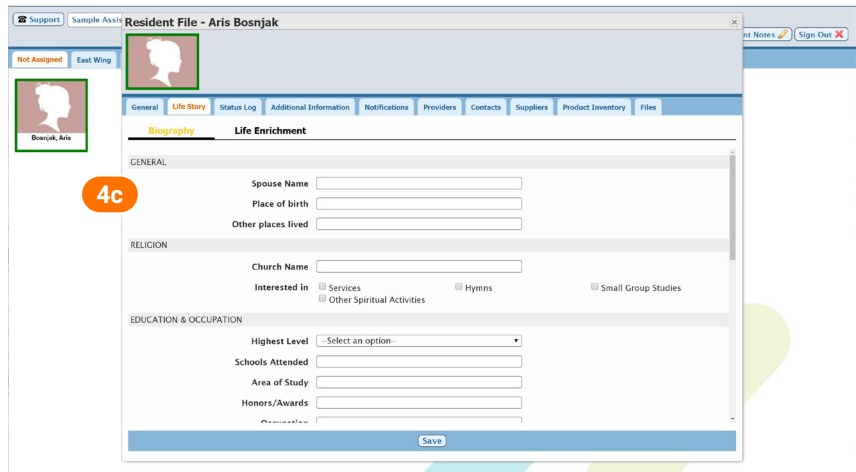



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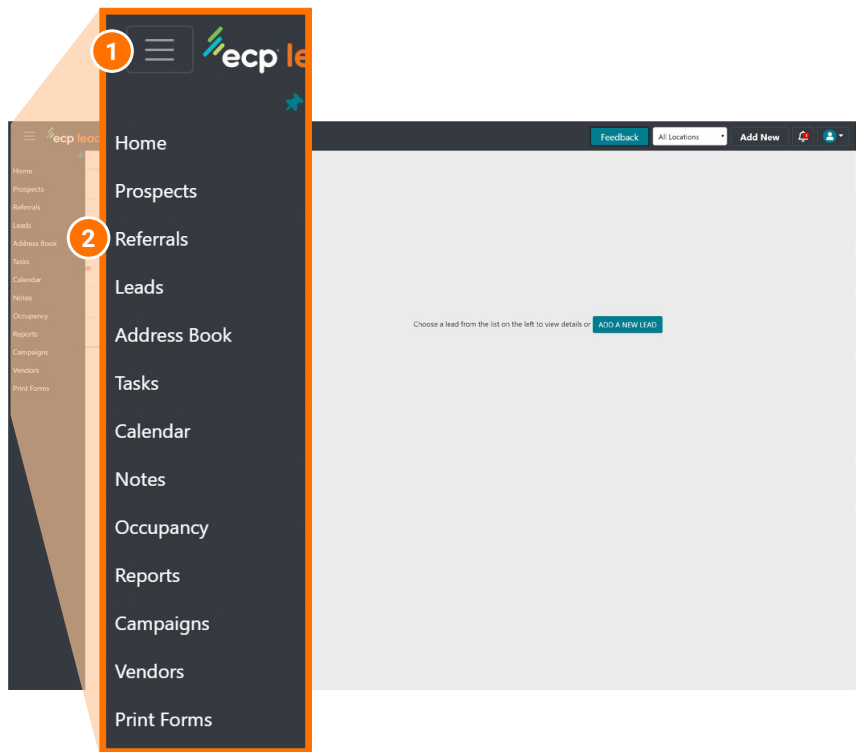
- 4c** Life Story is a new feature in ECP that includes biography and life enrichment information. Any biography or life enrichment information entered in Leads will be prepopulated.

The Prospect is now a Resident in ECP.



REFERRALS

- 1** Click the ≡ (hamburger icon). The hamburger menu will display.
- 2** Click **Referrals**. The Referrals window will display.

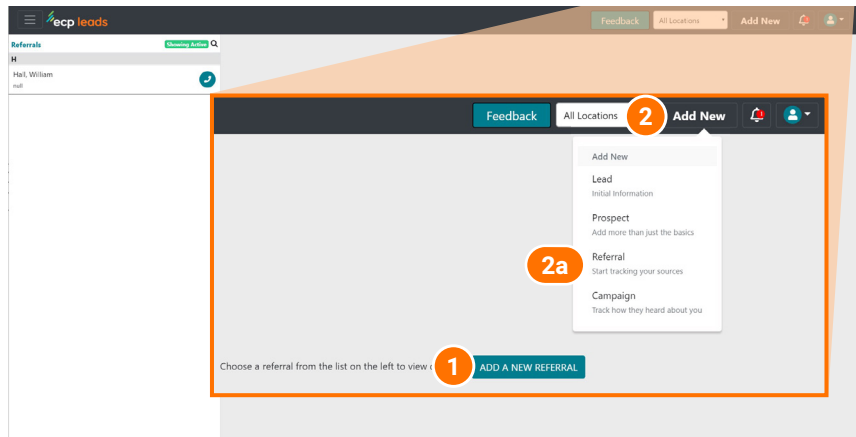


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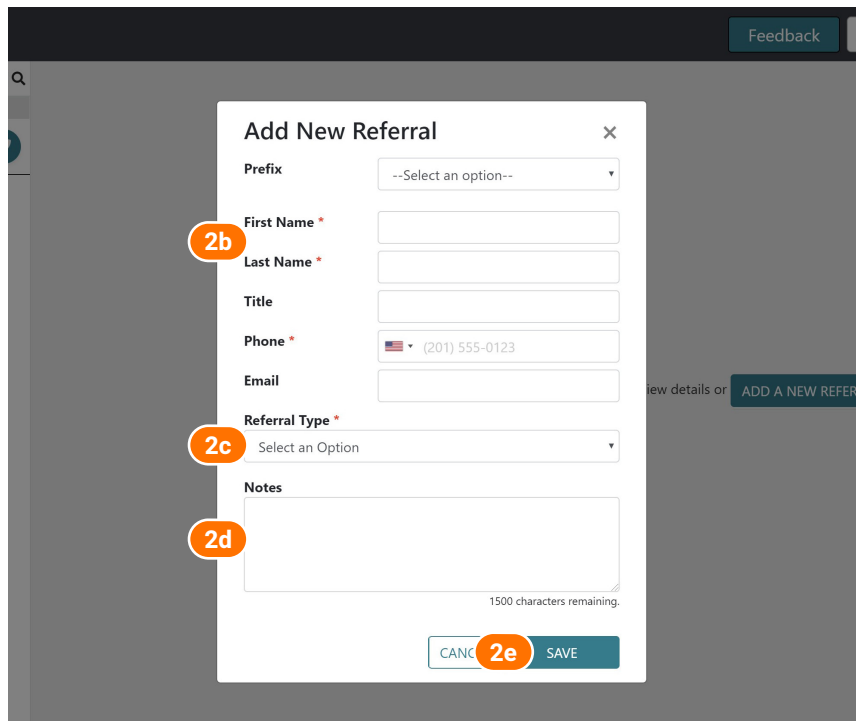
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Add a New Referral

- 1 Click **Add a New Referral** or
- 2 Click **Add New** from the top nav. The Add New menu will display.
- 2a Click **Referral**. The Add New Referral pop-up window will display.



- 2b Enter **First Name**, **Last Name**, and **Phone** in the text fields.
- 2c Select **Referral Type** from the dropdown list.
- 2d Enter **Notes** in the paragraph field.
- 2e Click **Save**.



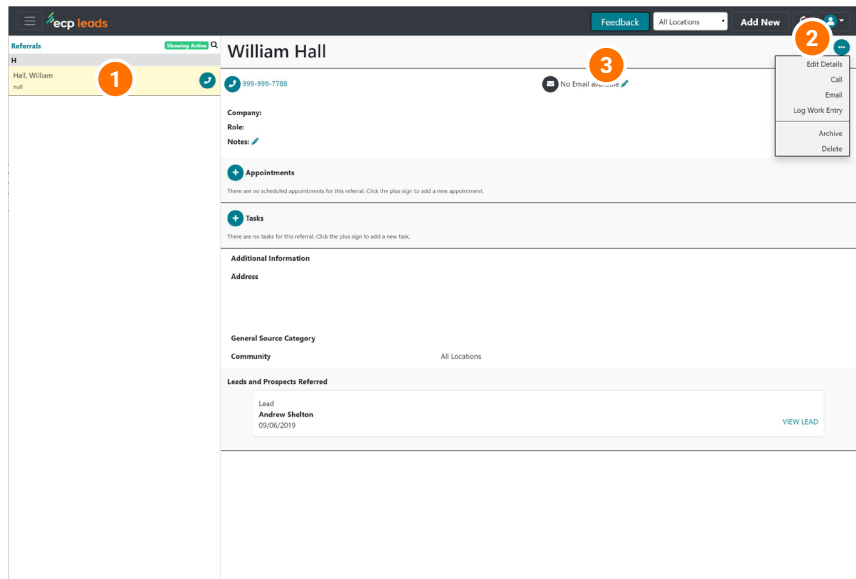
The screenshot shows the 'Add New Referral' pop-up form. The form contains the following fields and options:

- Prefix**: A dropdown menu with the option '--Select an option--'.
- First Name ***: A text input field.
- Last Name ***: A text input field.
- Title**: A text input field.
- Phone ***: A text input field with a country code dropdown (USA) and a phone number '(201) 555-0123'.
- Email**: A text input field.
- Referral Type ***: A dropdown menu with the option 'Select an Option'.
- Notes**: A large text area for notes, with a character count '1500 characters remaining.'
- Buttons**: 'CANCEL' and 'SAVE' buttons at the bottom right.



Edit Referral Details

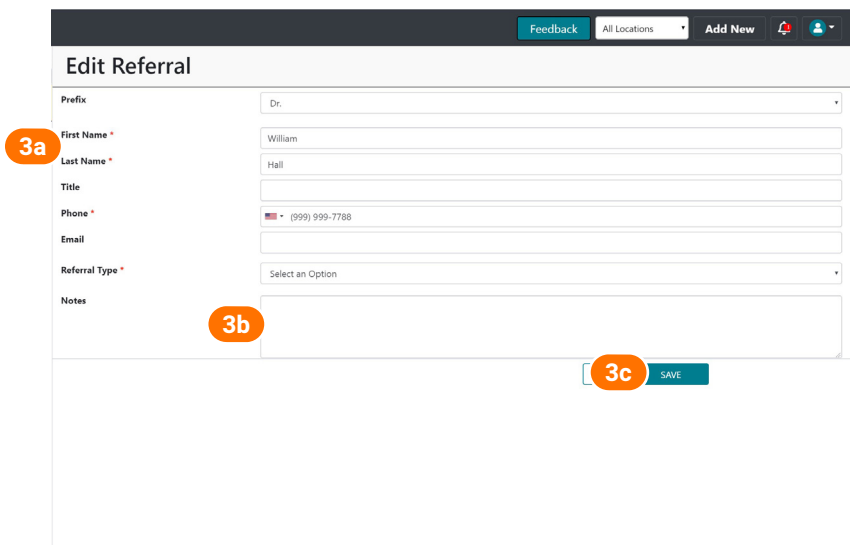
- 1 Click a **Referral** from the referrals list. The referral details window will display.
- 2 Click the  (More menu) or
- 3 Click an  (Edit icon). The Edit Referral fields will display.



- 3a Enter or edit referral details (**First Name, Last Name, Phone, Email, and Referral Type**).

- 3b Enter **Notes** in the paragraph field.

- 3c Click **Save**.




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Call or Email a Referral

- 1 Click the  (Phone icon) or .
- or
- 2 Click the  (More menu). Select **Call** or **Email**. The Complete Phone Call or Complete Email pop-up window will display. Follow the same steps for calling or emailing a Lead. See page 15.

Add an Appointment

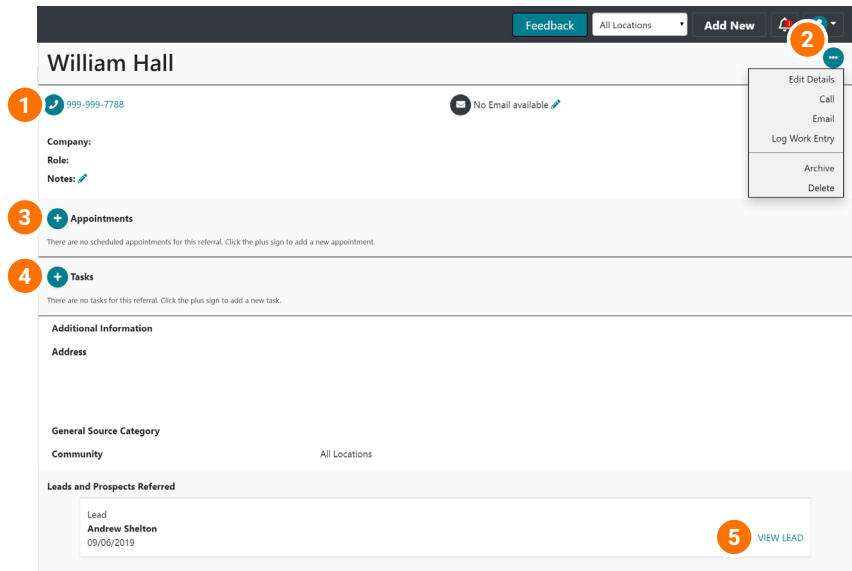
- 3 Click the  (Plus sign). The Add Appointment pop-up window will display. Follow the same process for adding an appointment to a Lead. See page 20.

Add a Task

- 4 Click the  (Plus sign). The Add Task pop-up window will display. Follow the same process for adding a Task to a Lead. See page 24.
- 5 Click **View Lead** to open the Lead details window.

Archive a Referral

- 6 Click the  (More menu). The More menu will display.
- 6a Select **Archive**. The Archive [Referral Name] pop-up window will display.



William Hall

999-999-7788

No Email available

Company:

Role:

Notes:

+ Appointments

There are no scheduled appointments for this referral. Click the plus sign to add a new appointment.

+ Tasks

There are no tasks for this referral. Click the plus sign to add a new task.

Additional Information

Address

General Source Category

Community All Locations

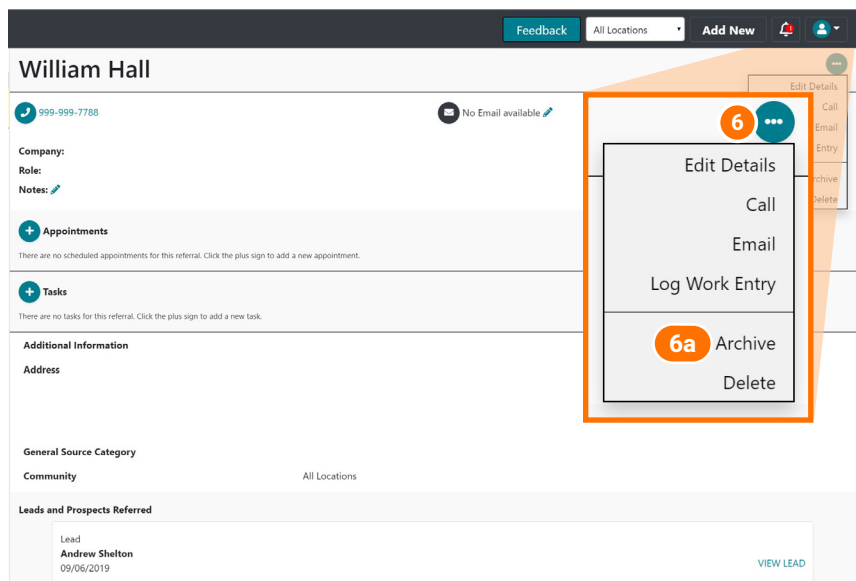
Leads and Prospects Referred

Lead

Andrew Shelton

09/06/2019

VIEW LEAD



William Hall

999-999-7788

No Email available

Company:

Role:

Notes:

+ Appointments

There are no scheduled appointments for this referral. Click the plus sign to add a new appointment.

+ Tasks

There are no tasks for this referral. Click the plus sign to add a new task.

Additional Information

Address

General Source Category

Community All Locations

Leads and Prospects Referred

Lead

Andrew Shelton

09/06/2019

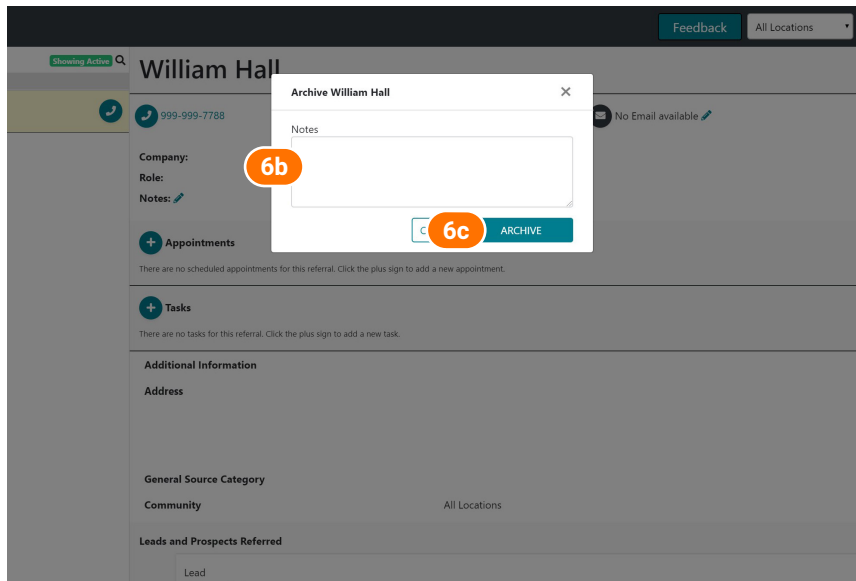
VIEW LEAD

More menu options:

- Edit Details
- Call
- Email
- Log Work Entry
- 6a Archive
- Delete

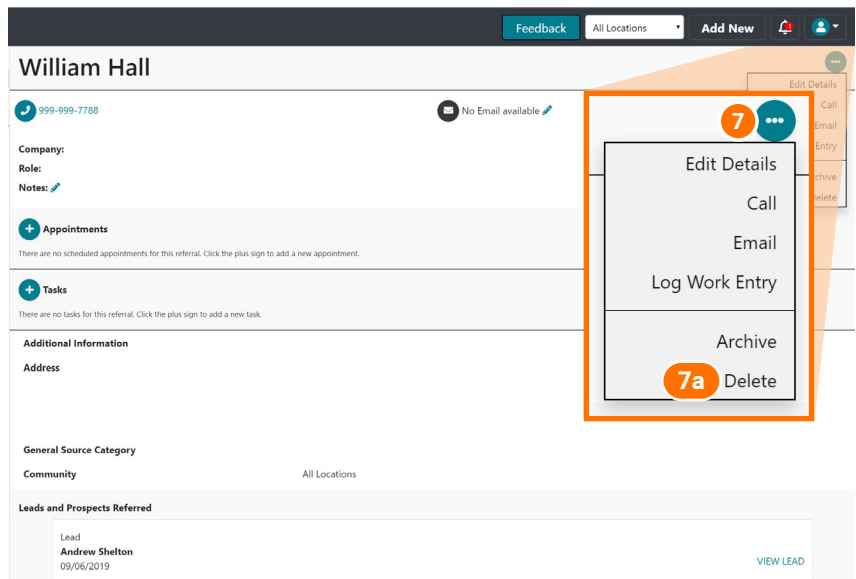


- 6b** Enter **Notes** in the paragraph field.
- 6c** Click **Archive**. The Referral will be moved to the Archived list.

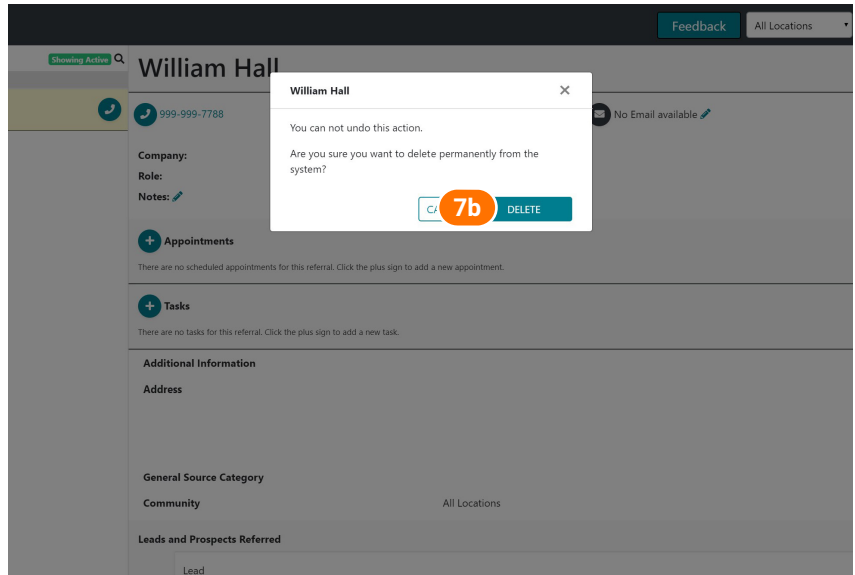


Delete a Referral

- 7** Click the  (More menu). The More menu will display.
- 7a** Select **Delete**. The Delete pop-up window will display.

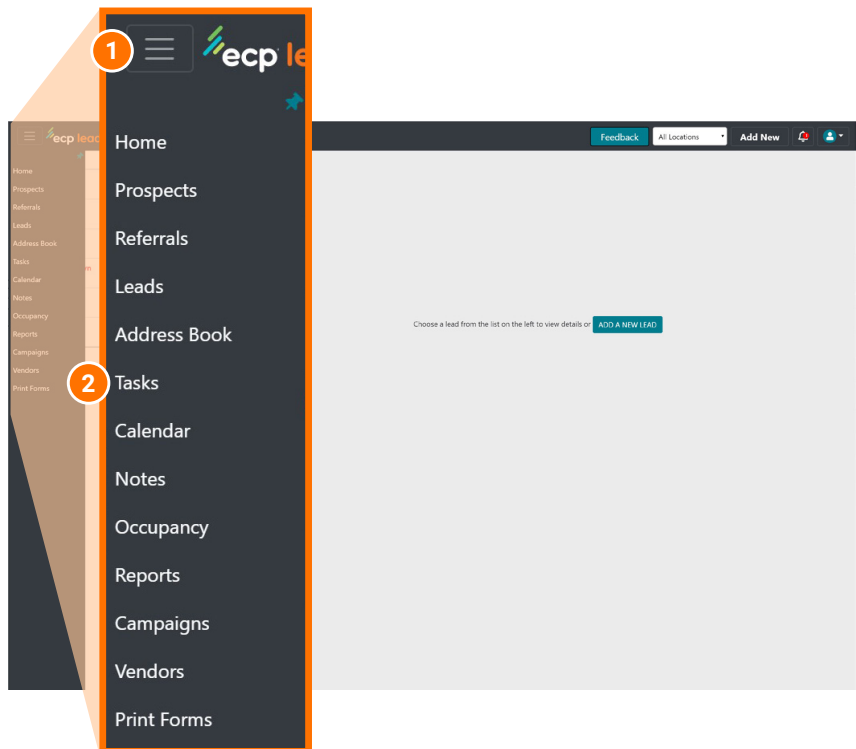



- 7b** Click **Delete**. The Referral will be deleted.
NOTE: You cannot undo this action.



TASKS

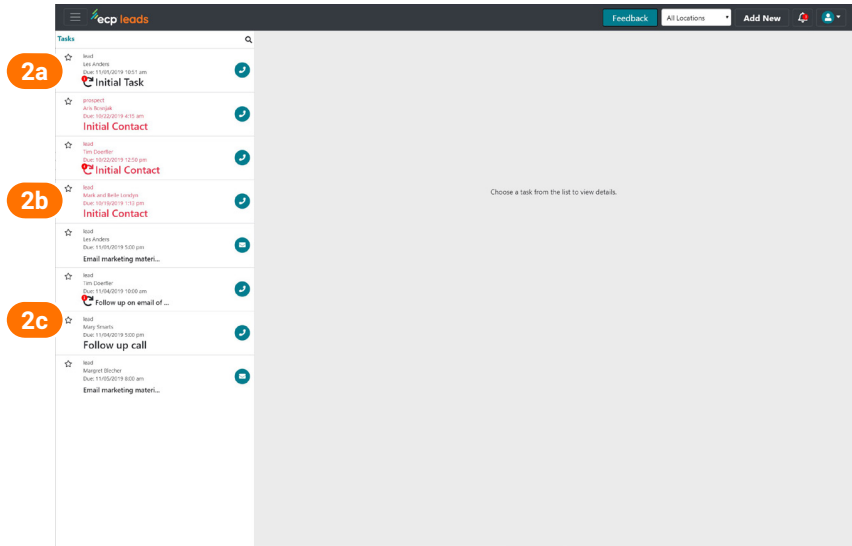
- 1** Click the **≡** (hamburger icon). The hamburger menu will display.
- 2** Click **Tasks**. The Tasks list will display.



2a New Tasks show in bold.

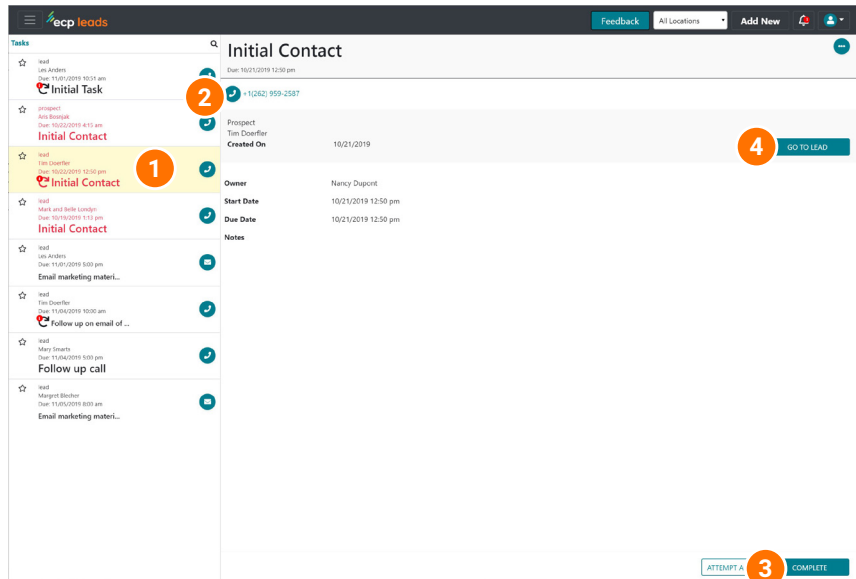
2b Overdues Tasks show in red.

2c Click the ☆ (Star icon) to favorite a Task and pin it to the top of the list.



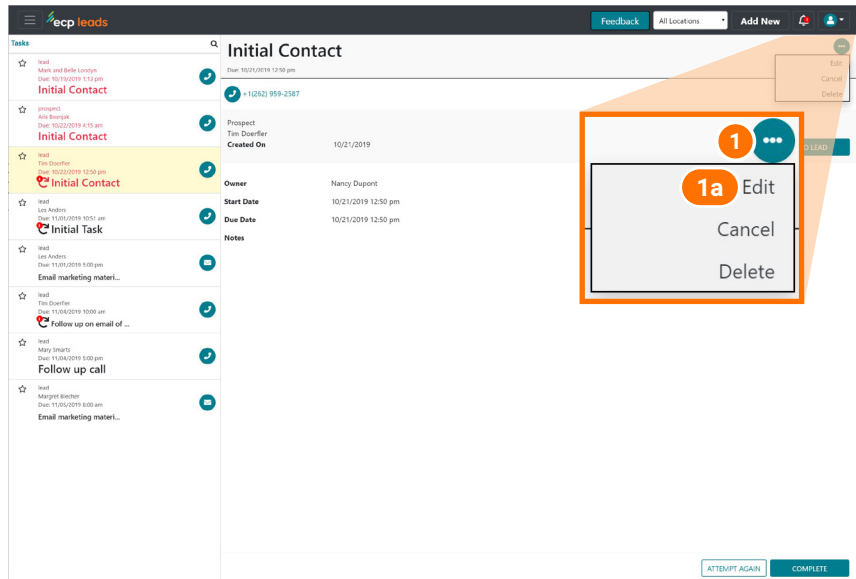
Complete a Task

- 1** Click a **Task** in the list. The details will display.
- 2** Click the **Action Icon** or
- 3** Click **Complete**. The Complete [phone call or email] pop-up window will display. Follow the same steps for completing a phone call or email on a Lead. See page 15.
- 4** Click **Go to Lead** to open the Lead details window.



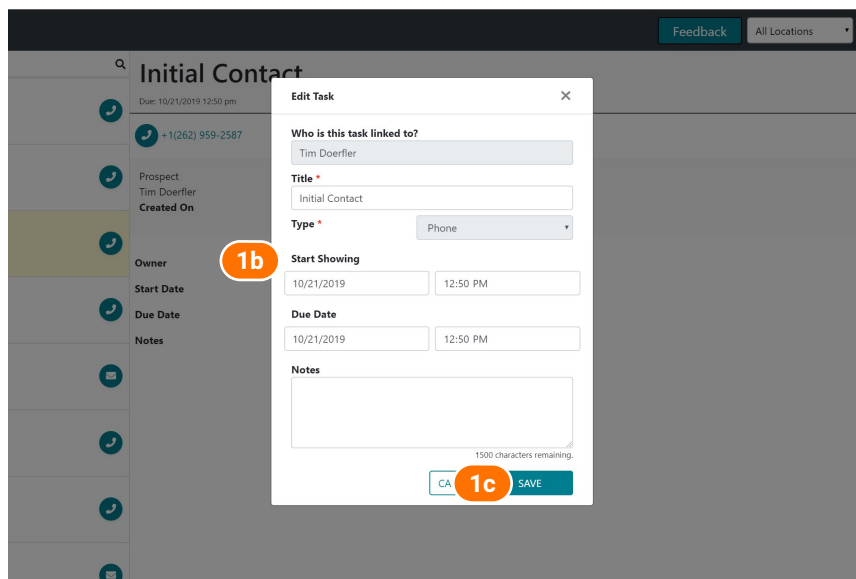
Edit a Task

- 1 Click the  (More menu). The More menu will display.
- 1a Select **Edit**. The Edit Task pop-up window will display.



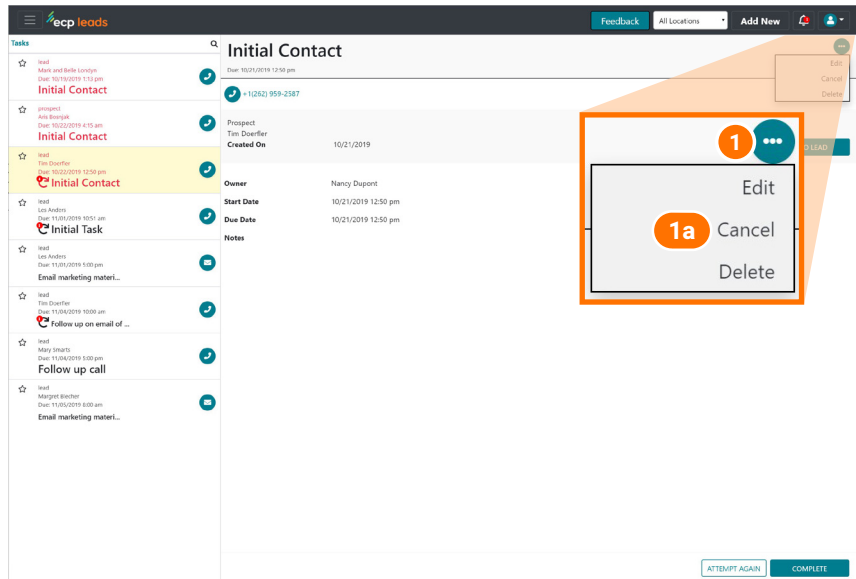
- 1b Edit Task details (Title, Type, Start Showing Date and Time, Due Date and Time, Notes).

- 1c Click **Save**.



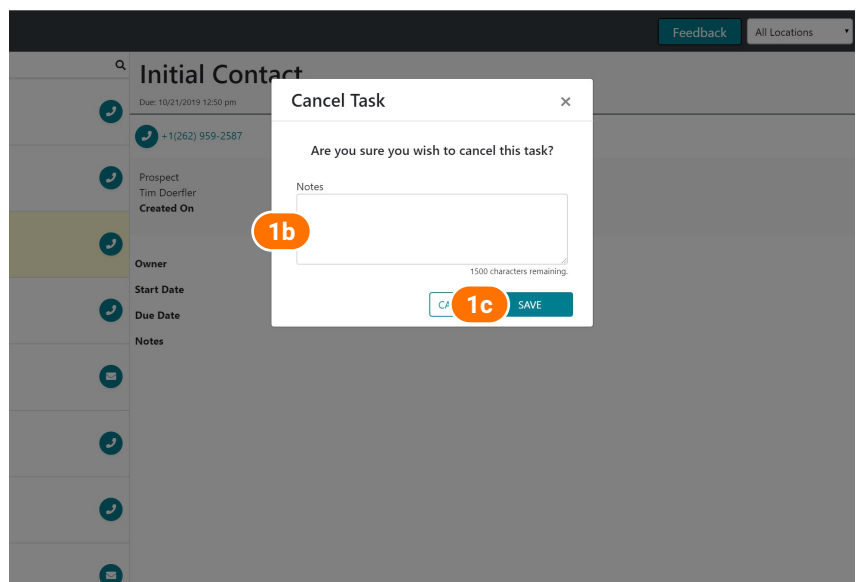
Cancel a Task

- 1 Click the  (More menu). The More menu will display.
- 1a Select **Cancel**. The Cancel Task pop-up window will display.



- 1b Enter **Notes** in the paragraph field.
- 1c Click **Save**. The Task will be removed from the Tasks list.

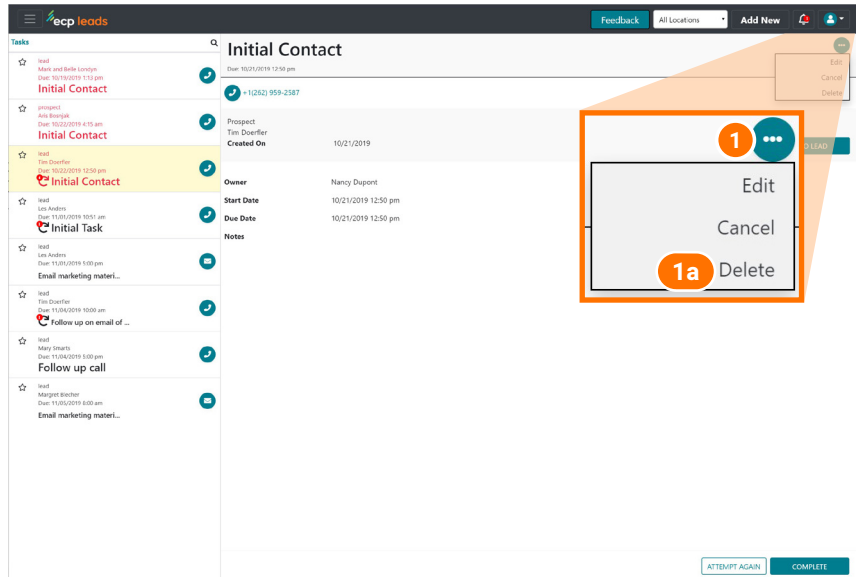
TIP: Go to the Tasks section in a Lead or Prospect details window to see Cancelled Tasks. Click Cancelled Tasks link.



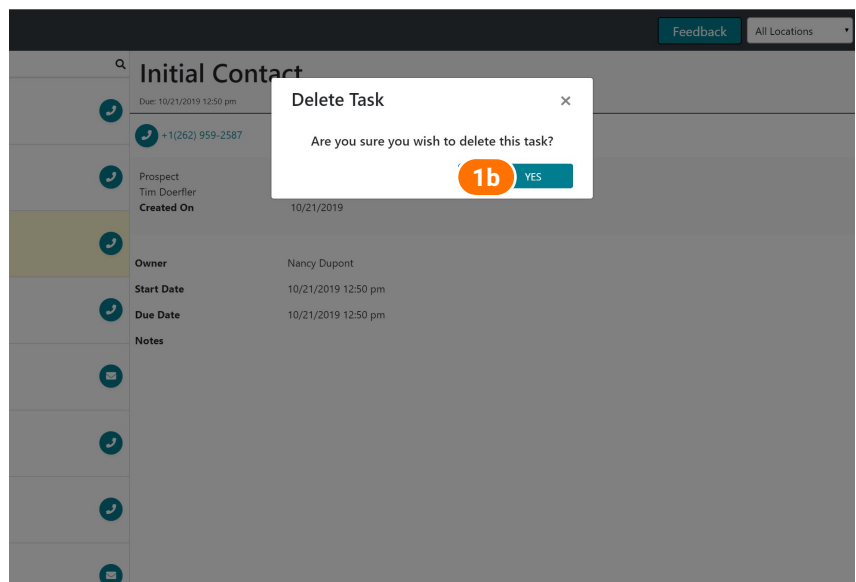
Delete a Task

1 Click the  (More menu). The More menu will display.

1a Select **Delete**. The Delete Task pop-up window will display.



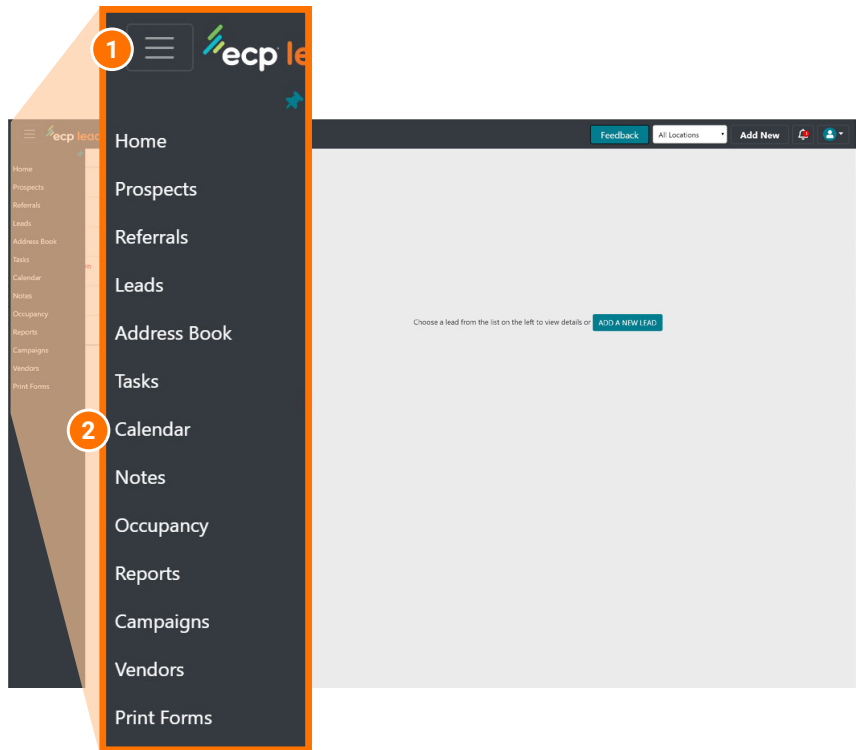
1b Click **Yes** to confirm you wish to delete.
NOTE: You cannot undo this action.



CALENDAR

- 1 Click the ☰ (hamburger icon). The hamburger menu will display.

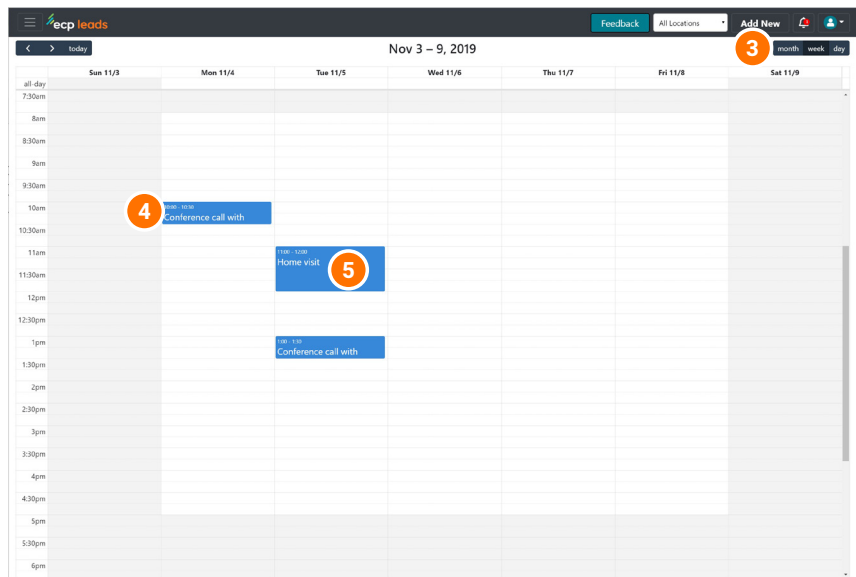
- 2 Click **Calendar**. The Calendar will display.



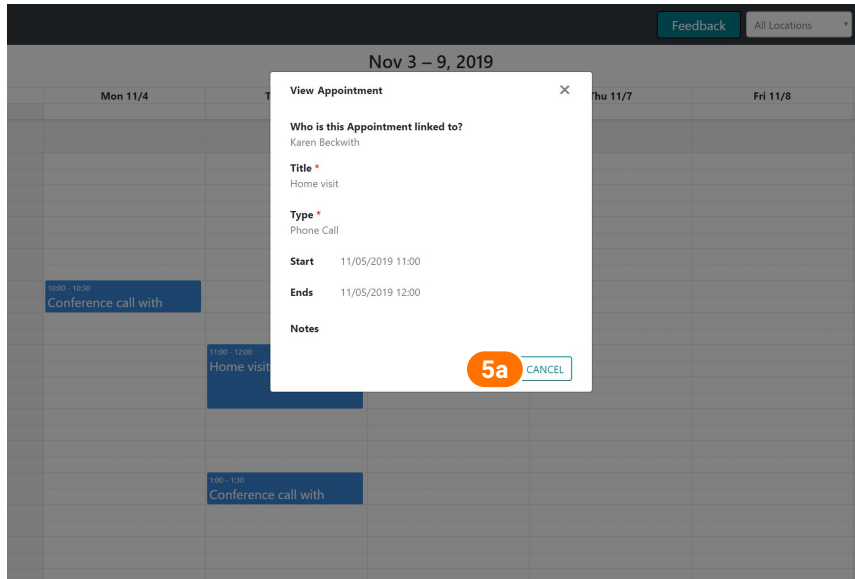
- 3 The week view is the default. Click **Month** or **Day** to change the view.

- 4 Upcoming appointments display in a blue box.

- 5 Click an **Appointment** to view the details. The View Appointment pop-up will display.

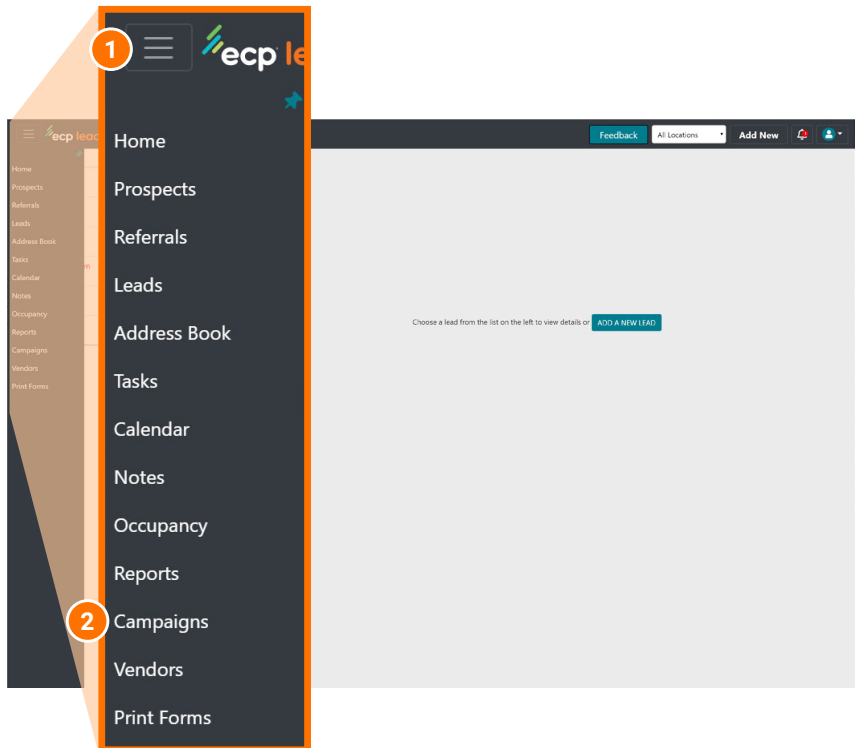


- 5a** Click **Cancel** or click the **X** to close the window.
NOTE: Editing is not available in this window.

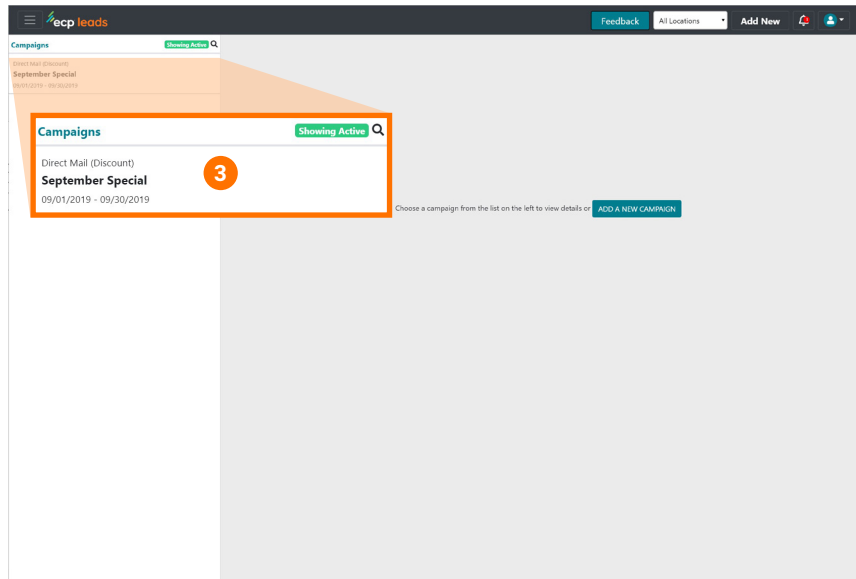


CAMPAIGNS

- 1** Click the **≡** (hamburger icon). The hamburger menu will display.
- 2** Click **Campaigns**. The Campaigns List will display.

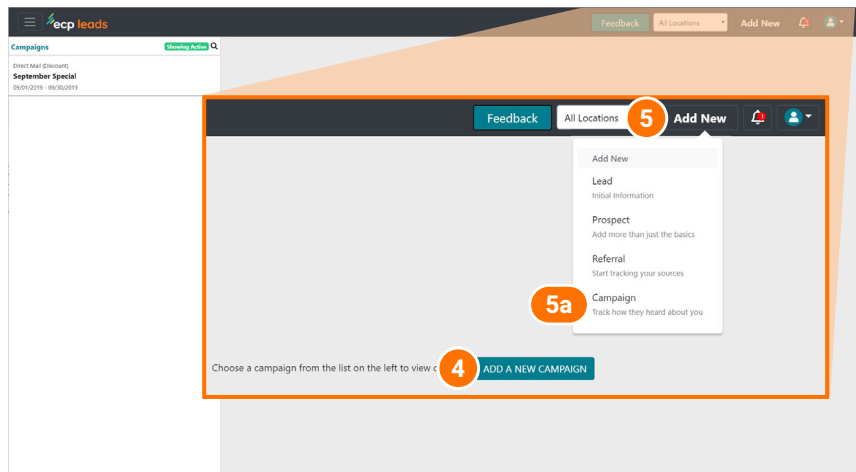


- 3 Each Campaign block will display:
- Channel
 - Title
 - Start and end date

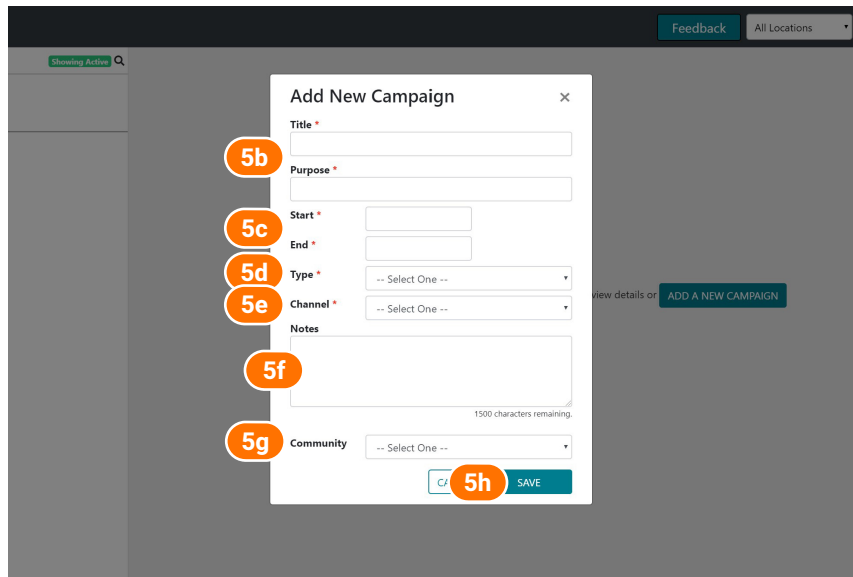


Add a Campaign

- 4 Click **Add Campaign**
or
- 5 Click **Add New**. The Add New menu will display.
- 5a Select **Campaign**. The Add a New Campaign pop-up window will display.

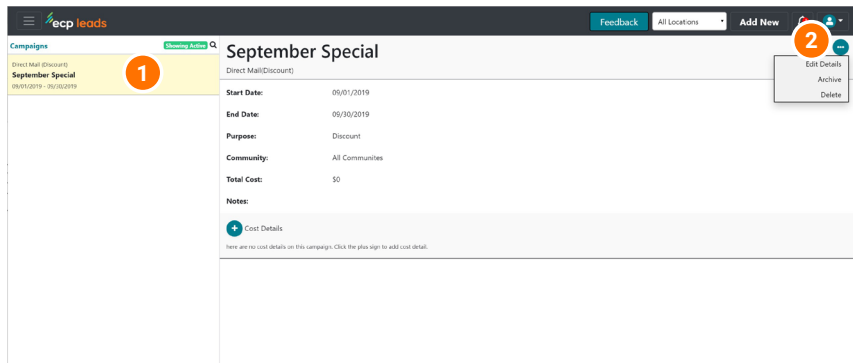


- 5b** Enter **Title** and **Purpose** in the text fields.
- 5c** Select a **Start Date** and **End Date**.
- 5d** Select **Type** (awareness, discount, etc) from the dropdown list.
- 5e** Select **Channel** (tv, radio, social media, etc) from the dropdown list.
- 5f** Enter **Notes** in the paragraph field.
- 5g** Select **Community** from the dropdown list.
- 5h** Click **Save**.



Edit a Campaign

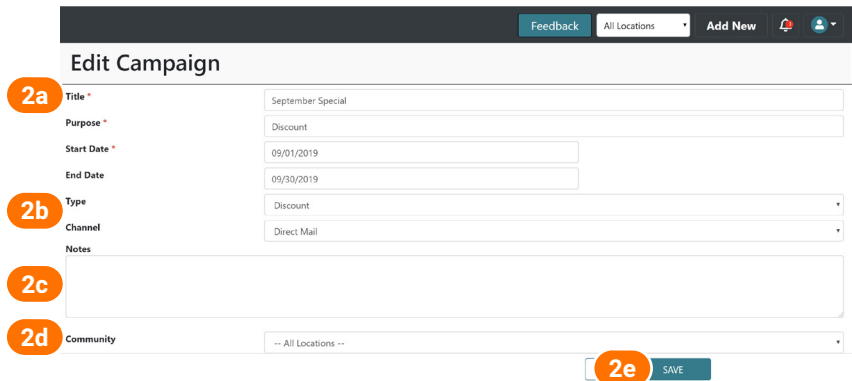
- 1** Click a **Campaign** from the list. The Campaign details will display.
- 2** Click the **⋮** (More menu). Select **Edit Details**. The Edit Campaign fields will display.




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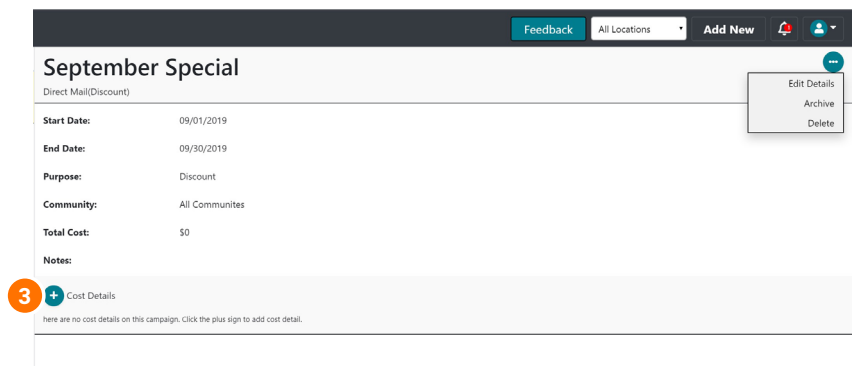
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- 2a** Enter or edit details in the text fields (**Title**, **Purpose**, **Start Date**, **End Date**, **Notes**).
- 2b** Select **Type** and **Channel**, from the dropdown lists.
- 2c** Enter **Notes** in the paragraph field.
- 2d** Select **Community** from the dropdown list.
- 2e** Click **Save**.

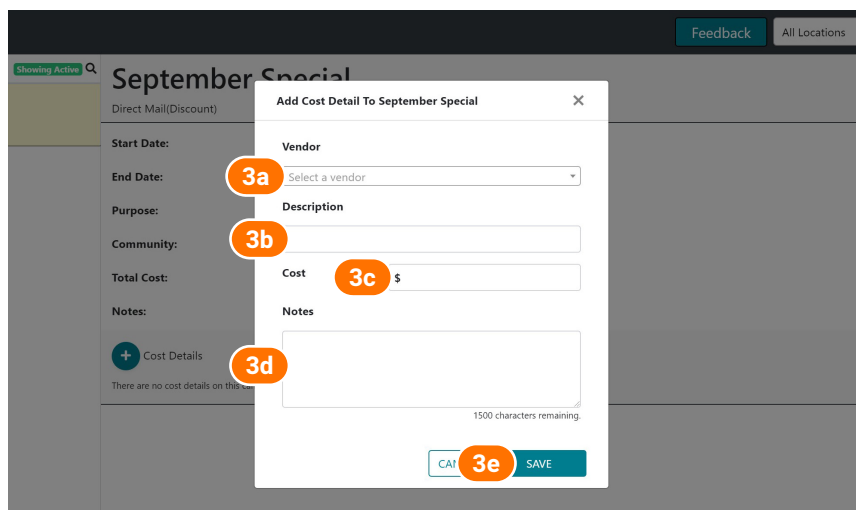


Add Cost Detail screen

- 3** Click the **+** (Plus sign). The Add Cost Detail pop-up window will display.

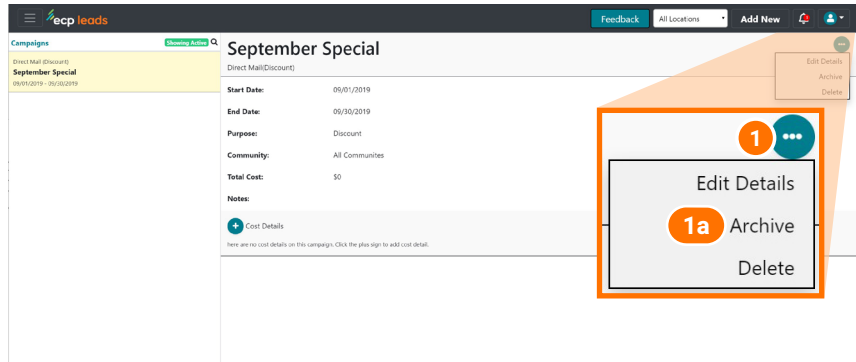


- 3a** Select a **Vendor** from the dropdown list. Select Add a New Vendor to add one.
- 3b** Enter a **Description** in the text field.
- 3c** Enter the **Dollar Amount** in the text field.
- 3d** Enter **Notes** in the paragraph field.
- 3e** Click **Save**.

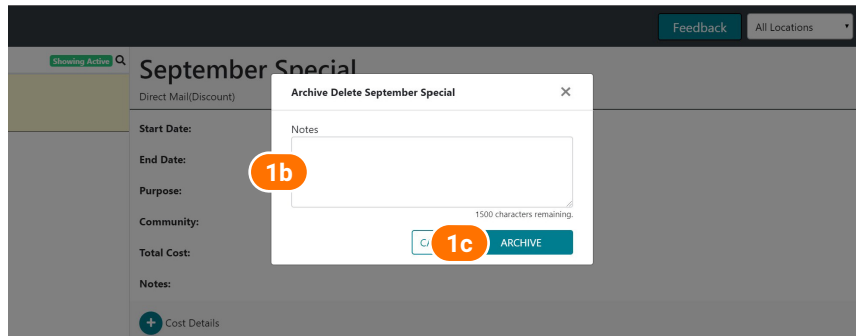



Archive a Campaign

- 1 Click the  (More menu). The More menu will display.
- 1a Select **Archive**. The Archive [Campaign Name] pop-up window will display.

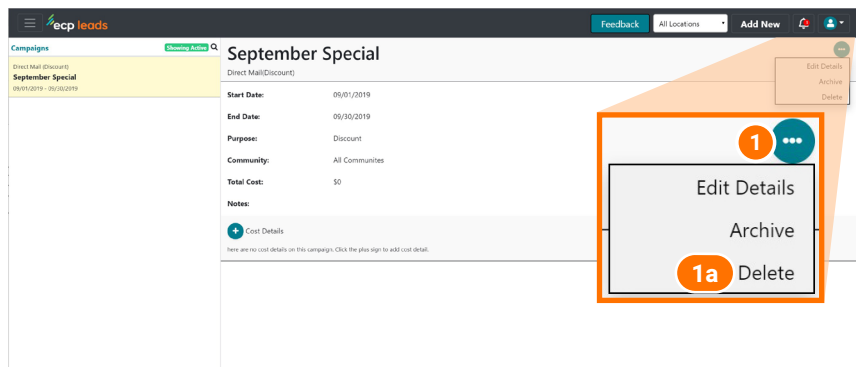


- 1b Enter **Notes** in the paragraph field.
- 1c Click **Archive**. The campaign will be archived.



Delete a Campaign

- 1 Click the  (More menu). The More menu will display.
- 1a Select **Delete**. The Delete [Campaign Name] pop-up window will display.



- 1b Click **Delete**. The campaign will be deleted.
NOTE: You cannot undo this action.

