# ChannelOnline
## Organizer User Guide

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## Organizer User Guide

The Organizer in ChannelOnline provides users a quick and simple way of creating a Note for documenting account events and information, or a Task to help manage complex document transactions (Quotes, Proposals, Sales Orders, Purchase Order, Invoices & RMAs) individually or through delegated users. Both of these items (Note or Task) can also be used by, or assigned to, the individual SalesRep (active personnel user, referred to as *user* within this document) to assist them in overseeing their work activities.

Although Notes and Tasks share the same underlying framework, they perform in two distinctly different ways in the application.  Notes focus on contributing additional information to an Account/Contact record while Tasks focus on work that an individual user needs to complete.

## Overview

Notes/Tasks are created quickly and easily from a number of locations within ChannelOnline.  The ability to create a Note or Task from various locations within the application makes it simple to access when needed.

Users can find access to the module from:

- Main Header Icon
- Account View Icon
- Active Document View Icon
- Within Customer Account
- The Organizer Icon within the Organizer Module

The Organizer Module, or simply *Organizer*, launches in its own separate window, giving users the capability to create a new Note/Task or view and edit an existing one.  Users can also create or access existing Note or Task entries from within the module or from any of the organizer "Plus Icons" throughout the application.

Simple facts regarding Notes and Tasks:

- Notes can be tied to: Accounts, Contacts or Users.
- Notes can be reassigned to another Account or Contact.
- A Note can be converted into Task.
- Tasks can be tied to: Accounts, Contacts, Users, or Documents.
- Tasks can be used to help manage documents, processes, or personal duties.
- Tasks can be delegated to other users to help manage, collaborate or complete, projects or documents.

All Notes and Tasks are searchable and can be displayed in the Results page of the Organizer.

- Within the Results page, users can view all Tasks assigned to them, delegated to them, or created by them and delegated to other users.
- The Results page enables users to filter or narrow search results by specific Note or Task type and attributes.
- The Results page can display additional attribute field information for each entry.

When editing or viewing Note/Task items:

- They can be printed or sent via email to others.
- They can be reassigned, copied, and Tasks can be delegated to other users.
- Once saved or updated, they are viewable on the user's My Channel Dashboard.

Access to a Note/Task is defined by how it was made.  For example, an Account Note is tied to that account, and a SalesRep can access it if they created it or have access to edit that account.

User Access to view all notes in the system can be granted by enabling the Organizer right called "Read All Notes / Tasks".  If disabled, users can only see their own activity (created by and delegated to them).

**Note/Task Access**
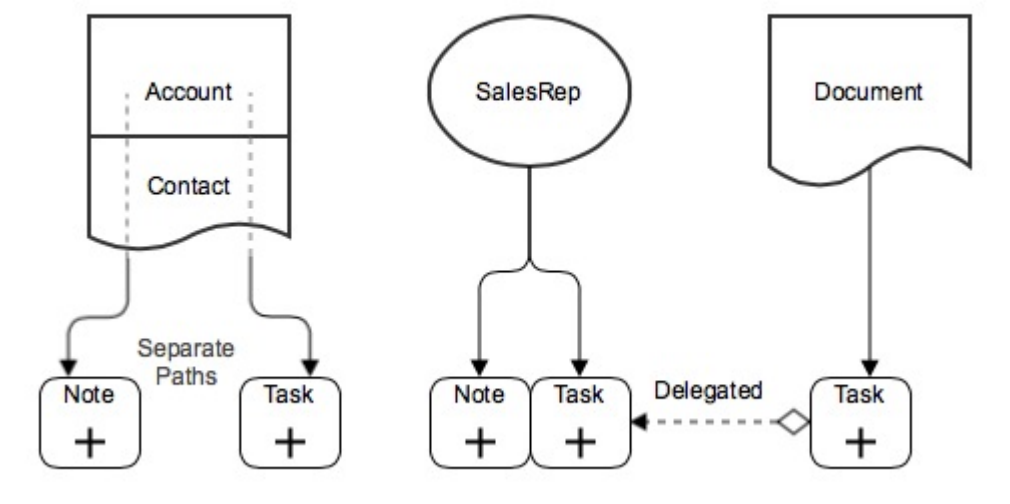
# Common Note Usage

### Notes - Accounts

Although Account Notes can be used to capture any information, they are often used to record instructions, characteristics, important events, associations, and potential business connected to an account.  Users with access to an account will be able to view all related notes stored in the Organizer for that account and add new ones.

Common scenarios where the notation of specific information about an Account will be captured:

- Idiosyncrasies or conflicts with or within the Account (not apparent to those unfamiliar with the client) with instructions on how to manage them.
- Historic information on the Account – Company background, what industry they cater to, what other suppliers they do business with, what system applications they use, etc.
- Assessment of the Account – What is their potential, what trends do they follow, will their business expand or diminish in the future, etc.
- Associations to industry groups or organizations (this can capture more detail than using Customer Custom Fields).

Typical information often stored within Account Notes:
- Hierarchical personnel information
- Designated "decision makers"
- Preferences (purchasing or otherwise) of the client
- Product preferences and procurement history
- Future opportunities and/or potential problems

### Notes - Contact

Contact Notes commonly identify the characteristics, habits, duties, and roles of the Contact(s) within the Account.  Notes can be used to identify support personnel in the organization and document any changes in personnel as they occur within the Account.

Notation of specific information useful on a Contact level:

- Role and duties of an individual
- Personnel data: hierarchy, employment date, change in position, backup or support personnel
- Scheduled date/times of Contact hours, time off, vacation etc
- Personal Contact information (family members, birthday etc)
- Potential problems or personality conflicts

**Notes - User**

User (SalesRep) Notes record a wide range of items that may reference or be associated to an Account or Contact, but not be tied directly to them. Information routinely seen in User Notes reflects industry news, business knowledge, or processes that could be communicated to others, used to remind or educate, or as reference for key information.

Information useful to capture on an individual User level:

- Industry news and trends
- Company policies, procedures, or announcements
- Product details, marketing or promotions
- Goal setting and attainment monitoring

## Common Task Usage

The Organizer's Task functionality gives users the basic tools to plan and manage work. As a management tool, the application provides a user the ability to set Task priorities, status during its life cycle, and monitor progress to completion. By delegation and setting reminders, Tasks can be managed by the Task's creator as its status and progress is updated by other users.

Tasks can be employed as part of an internal business process, generated at an Account level, for contacts and to manage documents. When responding to client Request for Quotes (RFQs), Tasks can be useful in the management of Proposal or Quote responses by providing assistance in overseeing the deliverable.

Tasks can also be created by individual users as personal "To Do" items, which are easily accessible and can aid in productivity.

**Tasks - Management**

Like Notes, Tasks can be created for system users, accounts, and contacts. In addition to those, Tasks can also be used with documents. The ability to set and direct Tasks within ChannelOnline reduces the need to use a separate application for this function.

Effective instances of managing with Tasks:

- Multi-tiered proposals/orders segmented and managed as stages/phases
- The ability to facilitate and respond to RFQ prerequisites
- Service and Labor services scheduled and tracked amongst different suppliers
- Managing complex orders
- Meeting goals and timelines

Typical information recorded in Tasks:

- Actions that must be completed by a specific user
- Follow-up tasks for completing a quote or proposal
- Requirements/Assessments that need to be met
- Project launch or review schedules/information

**Tasks - For Personal Organization**

Tasks in ChannelOnline have replaced the To Do list on the dashboard.  This functionality has been greatly expanded with the introduction of the Organizer in 7.0.  Any previous To Do items were automatically converted into personal Organizer Tasks for continued use.

- User Tasks that are unassigned to an account or document can be used to manage personal chores that may or may not be associated to business.
- Tasks used in this manner can be displayed in the Organizer as a way to manage a user's daily tasks.

Typical information recorded in Personal Tasks:
- Office-related tasks
- Appointments or events
- Important information needing easy retrieval

## Accessing the Organizer

Although the main way to launch the Organizer is by clicking on the Organizer icon in the header, there are many links and icons spread through the application.  They are easy to spot because of their formatting.  Most Note and Task access points have this format: "***Note (#) +***" OR "***Task (3) +***" There are a few exceptions to this rule).

You may do any of the following for Note or Task creation and viewing.

From the top of the application header, hover over the "Organizer Icon":

- Clicking on the "ORGANIZER" icon will bring the user directly to the results page for all Notes and Tasks assigned to them.
- Selecting the "+" next to the Note (#) option will launch the Organizer in a new window and open a new Note in Edit/View mode.
- Selecting the "+" next to the Task (#) option will launch the Organizer in a new window and open a new Task in Edit/View mode.

- Selecting the number to the left of the "+" for either a Note or a Task will bring the user to the Edit/View page within the Organizer for all the items reflected in that number. The first result in the list will be displayed in the Edit Panel.
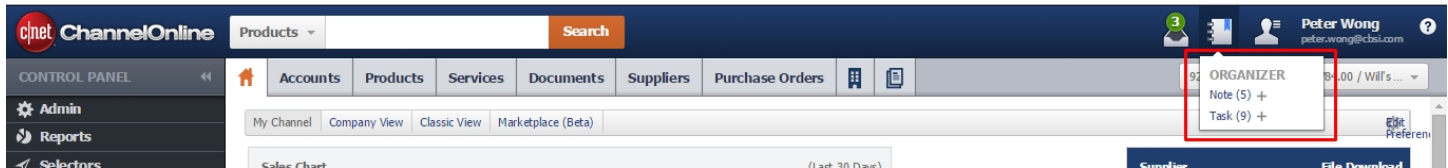


From the header tabs for Active Account and Active Document, hover over the tab:

- Select the "+" next to the Note or Task option to open the Quick Add Window in the bottom right of the screen. Once open, users can create the new Note or Task (documents do not have the Note function).
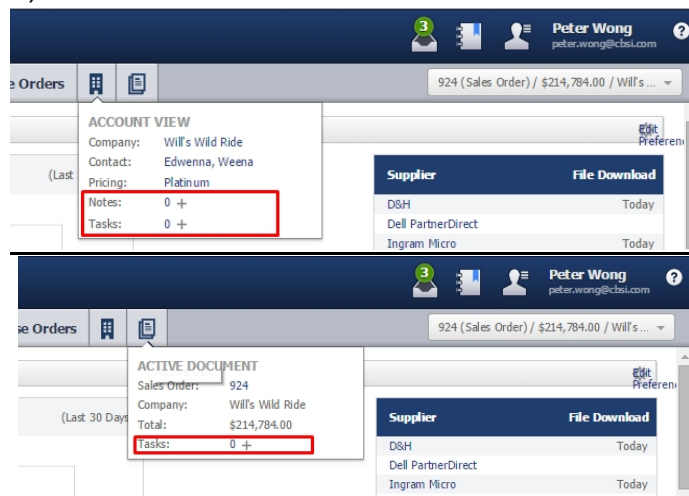


From within the Organizer or Contact component on the Account View page:

- Selecting the "+" next to the Account Note will open a new Note.
- Selecting the "+" next to the Account Task will open a new Task.

## Organizer Module Layout

The Organizer Module launches in its own independent window and uses two pages to support searching and editing/viewing Notes and Tasks. When users select the linked number next to the Note or Task, they are typically taken to the Results Page.

### Header Bar

Remaining constant through all pages in the module, the Header Bar contains the Organizer icon for adding and switching views, Search Box with filters, and the name of assigned user, document, or account. All Header information is supported in the Account View, Contact View, and Document View modes.
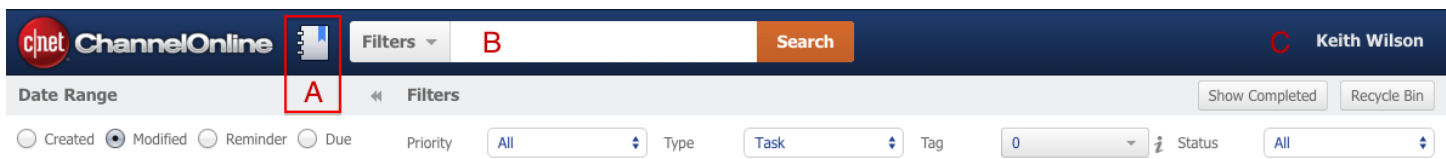


- Organizer icon - Add a new Note or Task, or switch views from account, document, or user. Hover over the "Organizer Icon" to display the available selections.
- Main Search - Keyword search can be combined to Filter options to find specific entries. Leaving it blank and selecting Search will return a search result using the default parameters.
- View Source Field - Displays the Account, Contact, Document, and User name being used for results.
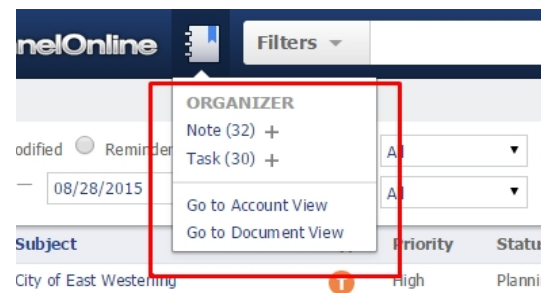


Expanding the Organizer icon on hover allows users to select the "+" next to the Note or Task, which will open the Edit page to create a new Note or Task. Or, click on the number to go to the search results page.

Main search is used to look up Notes/Tasks that have been created. The user, account, or contact you are currently working with will determine the results that the search will return. To aid in narrowing the possible result set upfront, there is a series of filters that can be used with the search function.
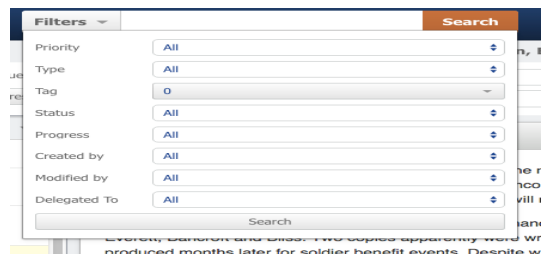
Note: *Selecting only Task in the Type filter will return more columns in the results, and the Completed Tasks button will appear.*

Within the Organizer icon dropdown is the ability to view all Notes from an Account View or a User View. Choosing the Account view displays Notes associated with a specific Account or Contact within that selected Account. Choosing the User View displays all the Notes created by the user accessing the Organizer. *Note: The Document View is only accessible when viewing Tasks.*

Regardless of the item type, if coming from a Document, the user is shown the document type and #. If coming from an Account, it displays the name of the Account. Likewise, if coming from a Contact or system User.

| Quote 1000162 | Rod, Todd | RT's Little Store | Peter Wong |
|:---:|:---:|:---:|:---:|
| *From Document* | *From Contact* | *Account View* | *From User View* |

## Results Page
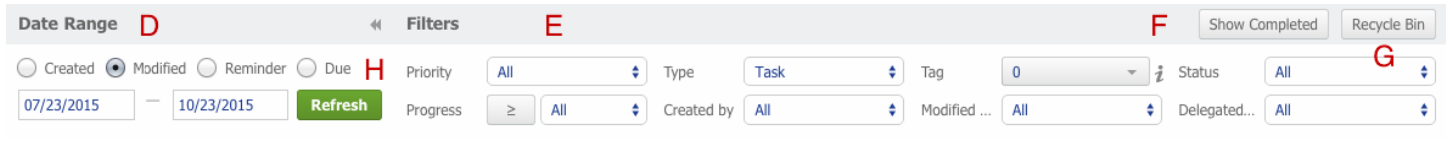
The Results page within the Organizer displays all of the Notes or Tasks created by a user, assigned to a user, account, contact, or document. Results can be sorted and/or filtered by selecting various options that will provide modification to achieve desired results. Selecting any of the results in the list will take the user back to the Edit page.



*Results page with two expanded entries*

**Results - Header**

By modifying the date ranges, date type, or attribute filters, you can narrow the results to assist in locating the item being searched for.



A. Date Range - Displays the current date type and dates that are being used to generate results. Results can be modified by making changes and clicking the Refresh button.

B. Filter Section - Filter options to find specific entries:
   • Priority - Urgent, High, Medium, Low
   • Type - Note, Task, or All
   • Tag - Keyword(s) used to identify, organize, or sort Notes or Tasks
   • Status - Active, Planning, Delegated, On Hold, Overdue, Cancelled, Completed, All (applicable to Tasks only)
   • Progress - Percentage of Task to completion 10 -100%; use the greater-than/equal-to button to broaden results (applicable to Tasks only)
   • Created by - User who created the document
   • Modified by - Last person who made changes to the document
   • Delegated to - Person to whom Task is delegated (applicable to Tasks only)

C. Show Completed button - Click to see only completed Tasks (available when viewing only Task in the Type filter).

D. Recycle Bin - Allows users to retrieve and restore deleted Notes or Tasks.

E. Refresh button - Takes modified date type and date range and applies them to the search results.

## Results - Body

Selecting the ID# or the description on either a Note or Task will open the item in the Edit/View page.



A. Expand Arrow - Increase viewing area of Note/Task to provide more details
B. ID# - Unique numeric identifier issued to a Note/Task
C. Expanded view - Additional information is displayed when in the expanded view mode; Creation date/time stamp, Created by, Modified date/time, Modified by.
D. Column Selection: Field information available for Note/Task filtering.  Only field attributes associated to a Note or Task populate with data
E. Mark Complete - Marks a Task as complete, stays in results table. Completes and removes a Task from the sort results.
F. Delete - Removes a Note/Task from the sort results.


Type column combines the type and priority into an icon for either Task or Note.
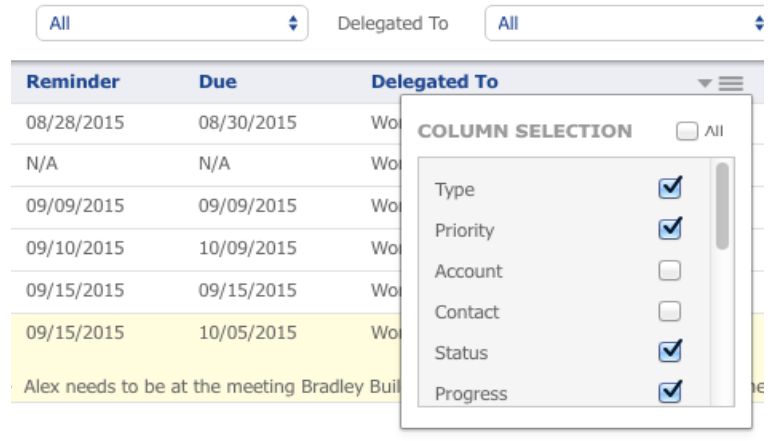
**Item Type**

- N = Note
- T = Task

**Priority Color**

- Red = Urgent
- Orange = High
- Green = Medium
- Blue = Low

## Results - Column Selection

Clicking on the arrow button will open up a dropdown containing multiple selections. When expanded, scroll to the attribute you want and then click the check box next to it to enable.  To disable them, repeat the process to expand the column and then uncheck the box next to the attribute you want to remove from the table.

*Column Selector adds / removes field attributes from the Results columns.*

## Edit (or View) Page

When adding a Note/Task through the Organizer module, users are taken to the standard "Edit" (or View) page format.  When viewing the details of a Note/Task, it is always in the Edit mode. The Edit page is divided into five main sections; Header Bar (A), Attribute Header(B), Edit Panel (C), Sort Panel (D), and Footer Action Buttons(E).  The Edit Panel is where the user enters the Note/Task subject and details and applies attributes to help categorize and save the document. Different attribute options are available for Notes versus Tasks.  These differences are reflected in the Attribute Header and Footer Action Buttons for each type.

Each Note/Task generated will have a detail line with references to the assigned ID #, Account, Contact, and sometimes includes Delegated User or Doc # (document type).

*Expanded "Sort by" button*

## Attribute Header - Notes

| Note: ID # 167 / RT's Little Store / Boils, Edwina | A | | B | Edit Assignment |
|---|---|---|---|---|
| Priority | C Medium | Tags | D 0 | |
| Subject | E Gettysburg Address | | | i |

*Information in the Field section of the Note identifies and helps in the search and sorting of Notes.*

A. Detail Line - Just below the Header Bar, the Detail Line shows the assigned unique identification (ID) number.  This information, along with the Account name, Contact name, or User name depending on the Note's association, are displayed on the Note header.

B. Edit Assignment - Assigns the Note to another Account or Contact.  Selecting this button displays a list of Associate names and their Customers.  This is not available for Document Tasks because they are specific to the document and account by default.

C. Priority - Assigned to the Note/Task for sorting and taking action can be: Urgent, High, Medium, or Low.

D. Tags - Keyword(s) used to identify, organize, or sort Notes. (See Company Settings > Manage Tags)

E. Subject - The theme or subject matter of the Note.  The Subject is used in searching and is sortable by filters.

## The Edit Panel - Notes

text.

**Bliss Copy** F

Ever since Lincoln wrote it in 1864, this version has been the most often reproduced, notably on the walls of the Lincoln Memorial in Washington. It is named after Colonel Alexander Bliss, stepson of historian George Bancroft. Bancroft asked President Lincoln for a copy to use as a fundraiser for soldiers (see "Bancroft Copy" below). However, because Lincoln wrote on both sides of the paper, the speech could not be reprinted, so Lincoln made another copy at Bliss's request. It is the last known copy written by Lincoln and the only one signed and dated by him. Today it is on display at the Lincoln Room of the White House.

**Four score and seven years ago our fathers brought forth on this continent, a new nation, conceived in Liberty, and dedicated to the proposition that all men are created equal.**

Now we are engaged in a great civil war, testing whether that nation, or any nation so conceived and so dedicated, can long endure. We are met on a great battle-field of that war. We have come to dedicate a portion of that field, as a final resting place for those who here gave their lives that that nation

| Save G | Copy H | Convert to Task I | Delete J | Email K ▲ |
|---|---|---|---|---|

*The Text area provides the writing area for the Note and associated actions.*

F. Body Text - The Text field uses some basic formatting options and gives the user the ability to input detailed information.

G. Save - Saves the Note/Task and makes it searchable and sortable via the Subject or Tags. Upon initial saving, the Note will automatically save after subsequent changes or updates are made.

H. Copy - A copy of the Note/Task will be created and associated with the current user, account, or document.  The new Note/Task will have "(Copy)" in the subject line as an identifier.
I. Convert to Task - All attributes of the Note will be transferred to a Task.  The ID# will remain the same but will be searchable/sortable as a Task.  A Note converted to a Task cannot be converted back to a Note.
J. Delete - Deletes the Note from the Edit page.  This will also delete the Note from the sort panel and the results page upon refresh.  A deleted Note can be resurrected by going to the "Recycle Bin" and selecting "Restore"
K. Email - Allows the user to send the Note to someone else via email, or print the document.

## Attribute Header - Tasks

When using Tasks additional header attribute options are available for monitoring and scheduling are displayed with the Priority and Tags fields.

| Task: ID # 100 / 6191 (Quote) / DTH.com / Delegated To: Wilson, Keith | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Priority | Medium | ↕ | Status | **A** | Active | ↕ | Progress **B** | 10% ↕ |
| Tags | 0 | ▾ *i* | Reminder | **C** | Open | | Due **D** | Open |
| Subject | Need to show Doc # (type) | | | | | | | *i* |

*Information in the Field Section of the Task identifies and helps in the search and sorting of Tasks.*

A. Status - Active, Planning, Delegated, On Hold, Overdue, Cancelled, Completed
B. Progress - Percentage of Task completed; 10% - 100%
C. Reminder (Date) - Scheduled reminder date
D. Due (Date) - Scheduled completion date for the Task

## Edit (View) Panel - Tasks

Two unique Task specific buttons are added to the Footer options, and the Convert to Task for Notes is removed.

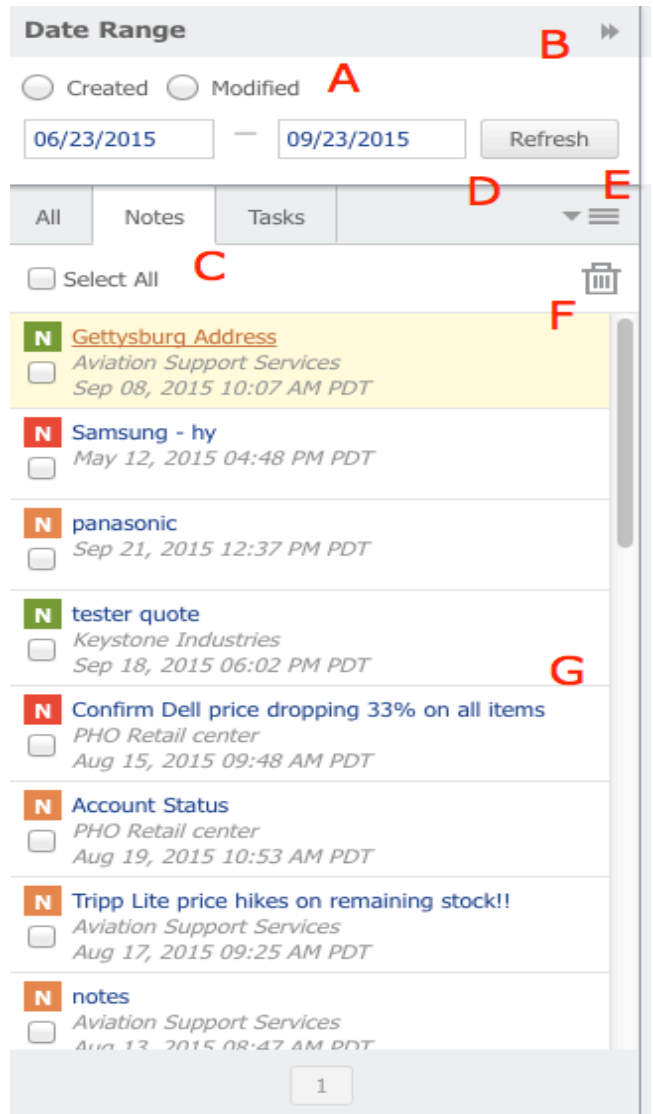|  | | **E** | **F** | | |
|---|---|---|---|---|---|
| Save | Copy | Delegate Task | Mark Complete | Delete | Email ▲ |

*The Text area provides the writing area for the Task and associated actions.*

E. Delegate Task - Designates the Task to another ChannelOnline user
F. Mark Complete - Completes and removes a Task from the dashboard results (it is available in search until it is deleted)

**The Sort Panel**

The Sort Panel shows the results from a search. The entries on the Sort are displayed on the Edit panel when selected and by default are listed by date of creation.

A. Sort / Date Range - The Organizer has a default 90 day date range that is applied with the Modified type when you open the Organizer. This can be adjusted and combined with the date type of Created or Modified to filter the search results.

B. Double arrow button - Toggles between the Edit page and the Results page keeping the current result set.

C. Sort Tabs - Choose between All, Notes, or Tasks. How you access the Organizer will determine the tab that gets selected. The entries under each tab are based on the current result set.

D. Refresh - Update the page view upon selecting an entry or see newly created entries in the results.

E. Sort by Selector - Drop down that sorts results by ID#, Subject, or Priority (see below)

F. Delete - Deletes the "selected" Notes on the sort panel. This will also delete the Note on the Edit panel and the results page. Deleted Notes can be resurrected from the Recycle Bin.

G. Entries - Notes/Tasks associated with search results.

---

**Date Range**    B ⏩

A  ◯ Created  ◯ Modified

06/23/2015  —  09/23/2015  [ Refresh ]

D                E

All    Notes    Tasks    ▼≡

☐ Select All   C              🗑
                                F
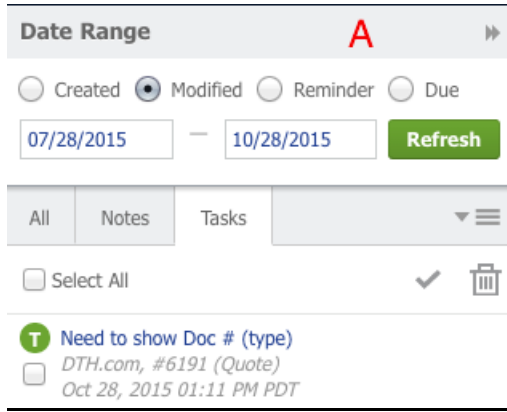
**N** Gettysburg Address
☐ *Aviation Support Services*
*Sep 08, 2015 10:07 AM PDT*

**N** Samsung - hy
☐ *May 12, 2015 04:48 PM PDT*

**N** panasonic
☐ *Sep 21, 2015 12:37 PM PDT*

**N** tester quote
☐ *Keystone Industries*
*Sep 18, 2015 06:02 PM PDT*    G

**N** Confirm Dell price dropping 33% on all items
☐ *PHO Retail center*
*Aug 15, 2015 09:48 AM PDT*

**N** Account Status
☐ *PHO Retail center*
*Aug 19, 2015 10:53 AM PDT*

**N** Tripp Lite price hikes on remaining stock!!
☐ *Aviation Support Services*
*Aug 17, 2015 09:25 AM PDT*

**N** notes
☐ *Aviation Support Services*
*Aug 13, 2015 08:47 AM PDT*

[ 1 ]
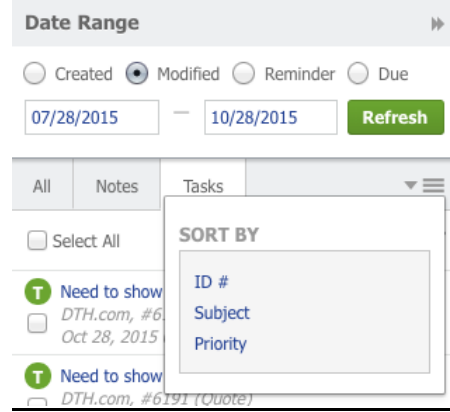
**Sort Panel Variations and Options**

The Date Range will display two additional date types when Tasks are present in results.



*Additional Task date options*



*Sort By drop down selections*

A. Sort / Date Range - Search for a Task from a range of dates based on its Created, Modified, Reminder, or Due date.

# Working with Notes

### Editing / Viewing

As described earlier in this document, access to the Organizer can happen at multiple points in ChannelOnline.  This is also true for creating and accessing notes.  A Note created from the Organizer icon, from within the Organizer (Results) or the Organizer component on the Account View page, is displayed in the standard "Edit" (or View) page format.  Even though Notes can be used to store any information, it does need to be tied to a specific User, Account, or Account/Contact.  Please keep in mind that Notes are not available on documents.  Documents have their own note process.

It is important to understand that the origination point will be assigned to the Note.  For example, if you come from an Account record, it will adopt the Company name of that Account and show it in the details line or header bar in the Organizer.

Add (create) Notes from:

- Header Icon in the application (associated to User as default)
- Active Account icon (associated to Account by default)
- Account View, Organizer, or Contact component (either Account or Contact)
- Within Organizer module from the Organizer icon (directly related to the current associated view)

*Please keep in mind that Notes are not available on documents. Documents have their own note process.*

Main Edit Features:

- Users with access to an Account will be able to see all Notes associated with it and its contacts.
- Once a Note (or Task) is saved with either a subject or body text, it will be automatically updated each time you make a change to the attributes or text.
- Notes can be reassigned if you started a Note in the wrong account. See Assignment / Reassignment of Notes and Tasks (below) for information on how to assign Notes to a different account or contact.
- Priority assigned to a Note represents importance.
- The Copy button can be used to take the same information and add it to another Account / Contact in the system.
- Email / Print button will take the subject, body, and attributes of a Note and put it in an email or into a default template for print.
- Deleting will remove the Organizer item and place it into the Recycle Bin (accessible from the Results page).
- Urgent Notes: It is recommended that Urgent Notes be used on Account information that needs to be known by all SalesReps working on an account. Examples include special pricing, contract information, and/or processes.

### Converting Notes to Tasks

Notes in the Organizer can be converted into a Task by selecting the "Convert to Task" footer button on the Edit page. By doing this, all information associated with the Note will be transferred to the Task. Task attribute field options will now be available to manage dates, progress and status. The ID number will remain the same, but it will now be searchable as a Task ID #.

## Working with Tasks

### Editing / Viewing

As in the composition of a Note, a Task is created from the same areas within ChannelOnline and in the same fashion as a Note. While similar in appearance and structure to a Note, a Task is associated with a User, Account, Contact, or Document and can be monitored to completion, unlike a Note.

Add (create) Tasks from:

- Header Icon in the application (associated to User as default)
- Active Account icon (associated to Account by default)
- Active Document icon (associated to the Document by default, cannot be reassigned)
- Account View, Organizer, or Contact component (either Account or Contact)

- In Organizer module from the Organizer icon (directly related to the current associated view)

Tasks are most effective when attributes are consistently applied for status, progress, and due date.  Not only are these attributes used in search result filters, but they are also used within the My Channel dashboard widget to provide a quick update to individual users.

Main Edit Features:
- Users with access to an Account or document will be able to see all the Tasks associated with it.
- Once a Note (or Task) is saved with either a subject or body text, it will be automatically updated each time you make a change to the attributes or text.
- Notes can be reassigned if you started a Note in the wrong account.  See Assignment / Reassignment of Notes and Tasks (below) for information on how to assign Notes to a different account or contact.
- Delegate Task assigns the Task to another user of ChannelOnline (see Delegation of Tasks below).
- Mark Complete button resolves the Task and shows it in the Organizer with strike-through text but will continue to display it in the results when the Show Completed button is used.
- The Copy button can be used to take the same information and add it to another Account / Contact in the system.
- Email / Print button will take the subject, body, and attributes of a Task and put it in an email or into a default template for printing.
- Deleting will remove the Organizer item from the search results and place it into the Recycle Bin (accessible from the Results page).

**Delegation of Tasks**

Tasks can be delegated to another associate for review, assistance, collaboration, approval, or completion.  Tasks can only be assigned to one user at a time.  It is recommended that large projects, or processes involving multiple users, be broken down into individual Tasks and sent to multiple team members for individual completion.

Once delegated, the appointed user will be notified on the notification icon that a new Task has been delegated to them.  The updated owner of the Task will be reflected in the results page of both the delegator and the delegatee.

**Marking Complete**

Once a Task is finished, it can be Marked Complete to show that no more work needs to be done. There are three ways to mark items as Complete within the Organizer. When looking at the item on the Edit page, click the Mark Complete button in the footer, or select the checkbox for the item from the Sort Panel of the Edit page and click the Mark Complete check icon at the top. From the Results page, click on the checkbox next to the item and then click the Mark Complete button.

- To see completed items, use Show Completed from the Results window.
- To remove the Complete Status, update the Status and Progress to something other than Completed and 100%.

**Tracking with Attributes**

Effective use of Tasks can be helped with the use of the attribute fields in the Edit page header. These fields will be viewable with the Task on the My Company Dashboard and can help to filter Tasks in search results. Status and Progress are the two best attributes to use for moving a Task to completion. Regular usage of Reminder and Due Dates will also assist in providing prompts to the user for uncompleted Tasks.
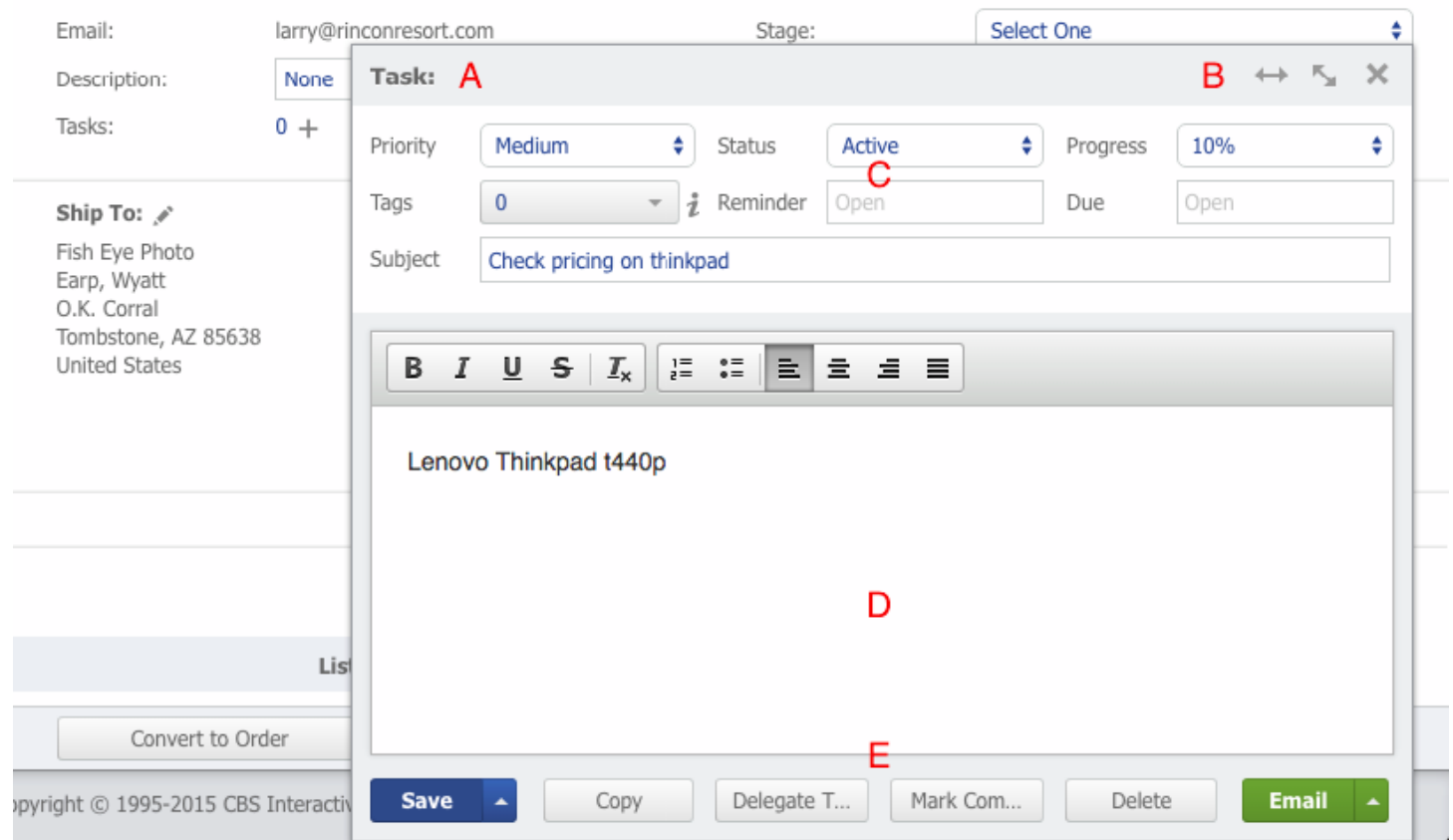
# Quick Add Window

The Quick Add Window occupies a small footprint on the lower right side of the screen and lets the user work on their document while the Note/Task is open. The screen can be moved to the left side of the screen to reveal information that may be hidden behind the window.

Once the window is open, the user can start typing in the body of the Note/Task without populating any of the fields. By default, the Quick Add Window assigns the Note/Task to the active Account or Document reflected in the Active tab it was launched from. To access the attribute filters, click the save button, adding your entry to the database, and they will appear. The window will remain open and available for editing until closed by the user.

The window can be expanded into the full sized Edit Page within the Organizer module by selecting the expand option on the top right of the window. Once expanded, a Quick Note cannot be returned to its original size and location on the main ChannelOnline application.

Expanding to the Edit Page within the module provides the user:

- A greater writing area
- The addition of the sort page to view other Notes/Tasks created by or assigned to the current user
- Ability to sort and filter all results
- The capability to open additional Notes or Tasks



*Quick Add Window*

A. Details line will update when user saves and returns to the item.
B. Window placement icon buttons:
   a. Left / Right - switches the Quick Add window to the left or right side of the screen to view covered information.
   b. Expand - moves the item to the Organizer Edit page.
   c. Close - closes the window.
C. Attribute fields and Subject line will appear and reflect the type of the item to be created (Note or Task).

D. Body text field
E. Footer will mimic the Edit page options of the Organizer module that are for the selected item type.
   a. Save and Close is special to the Quick Add Window.  It will save the item and keep the user on the current page in the main application.

## Maneuvering Between Pages

Within the Organizer icon dropdown is the ability to view all Tasks from an Account View, a User View, or a Document View.  Choosing the Account view displays items associated with a specific Account. Choosing the User View displays the Tasks created by the user as well as all Tasks delegated to that user.  Choosing the Document View displays Tasks associated to the various documents within ChannelOnline (Quote, Proposal, Sales Order, Invoice, Purchase Order, and RMAs) that the user has access to.  Or, if access to a specific document, those for that document only.

| Quote 6201 | Purchase Order 1039 | Invoice 10033 | RMA 10005 |

| Keystone Industries | Peter Wong | Eiz, Liz |

*Associated to an Account*          *Associated to a User*          *Associated to a Contact*

Using Tags to identify and group specific documents can help to manage and collate Account, Contact, and document items.  As previously mentioned, items can be set with periodic reminders to ensure open and ongoing documents are reviewed and addressed on a scheduled basis.

The Edit page is the default view and most widely used page to create and edit Notes.  Entries in the Sort Panel are the results of a search.  Search results are listed and sortable by Date, Priority, ID #, and Subject.  Selecting an entry on the sort panel populates it in the right side of the edit page.

Once saved, an item will autosave as new entries are made to it.  Users can also add a new Note or Task when on the Edit page from the organizer icon.  When creating a new Note, the current one will save and close.
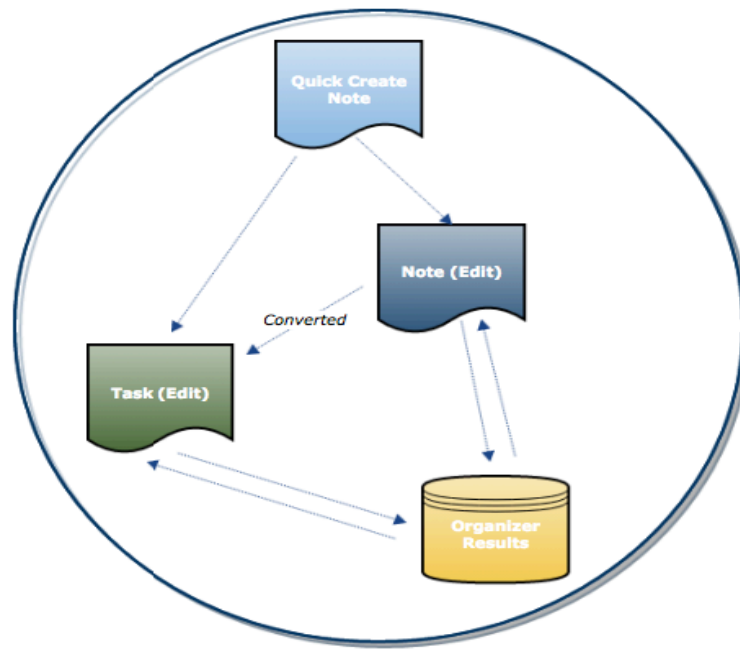


*Note Crossflow - From a Quick Created Note to Standard Note (Converting to a Task) or Saved in Organizer*

### Switching Between Edit & Results Pages



The double arrow icon sitting between the Date Range section and the Attribute Fields / Filters on either page will allow users to switch between the views.

From the:

- Search Results page - the arrows will take the user to an Edit page view of the last or top entry.
- Edit page - the users will be taken to the Search Results page.

In either scenario, the same search results are displayed in the Sort panel or on the Search Results page.
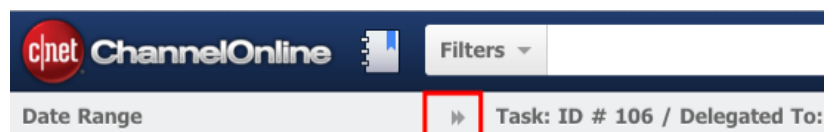
**Assignment / Reassignment of Notes and Tasks**

Collaboration and sharing of Notes are facilitated by the assignment of a Note to another client Account and/or Contact using the "Edit Assignment" button.  Those who manage Accounts through "Personnel Groups" in ChannelOnline can add a Note to an Account or Contact and give all group members assigned to that Account access to view/edit the Note.

- Tasks tied to documents (Sales Order, Invoice, RMA, Proposal) cannot be assigned to another Account or Account Contact.
- Once a Note is converted into a Task, it cannot revert back into a Note.

## Organizer Item Workflow
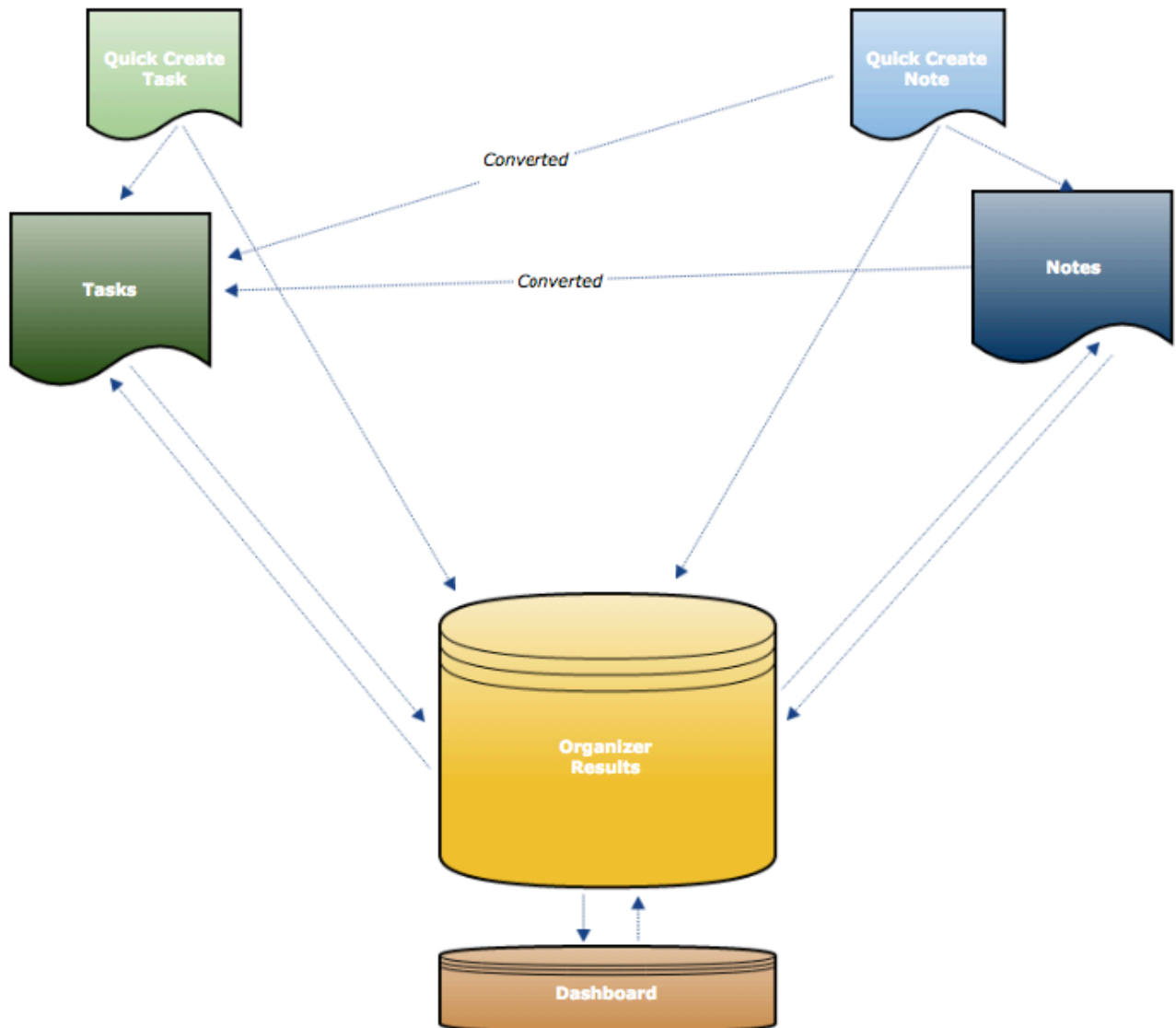


*Organizer Crossflow - incorporation of Notes, Tasks, Results with Dashboard*

## Searching and Filters

The Header houses various tools and information for the user that are important for searching. The Master Filter allows the user to narrow available attributes to find a specific Task.  *Always remember to check the upper right corner to determine the User, Account, or Contact you are*

*working on in the Organizer,* as this will affect the result set that is returned (see Maneuvering Between Pages).
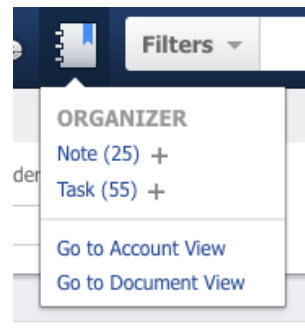


*Accessing a Task from the header in the User View*
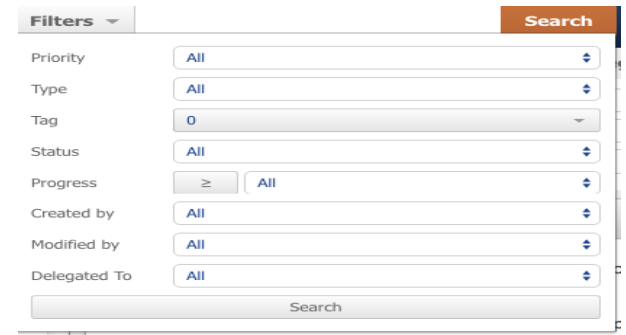


*The Master Filter lets the User narrow their search for a specific Task*

The Search/Filter located on the main header is used to search for a specific Note or Task, or a series of Notes or Tasks. One can search by Subject keyword or by manipulating the field attributes to narrow the search. Once selected, the user is brought to the results page.

**Filtering Tips**

- Use of Type to narrow search
- Equal To or Greater Than button
- Created By VS. Modified By
- Tags

**Results**

All saved Notes and Tasks will appear on the "Results" page and will also be updated on the user Dashboard. The Results page acts as a repository of all Notes and Tasks created by that user as well as all Tasks delegated to that user.

Selections made on the results page need to be followed by clicking the "Refresh" button.
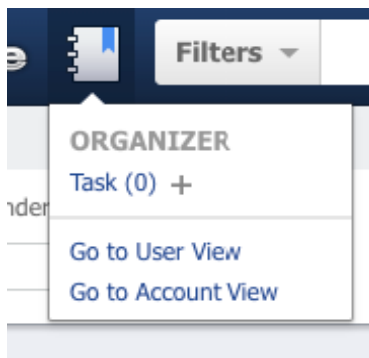
Within the Results page, one can narrow their search further and pull up specific Notes/Tasks, or a series of Notes/Tasks, to access and review. Selecting a Note/Task on the Results page will display the entry on the Edit page. A "Double Arrow" button underneath the Filter dropdown toggles the User to and from the Results page and the Edit page. *Task Crossflow - From a Quick-Create to full Task to Organizer*
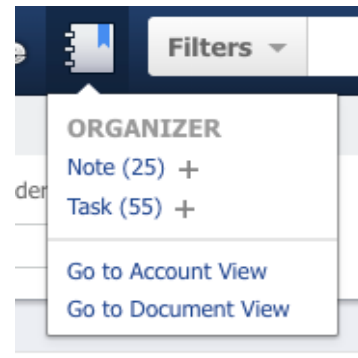
c|net Content Solutions
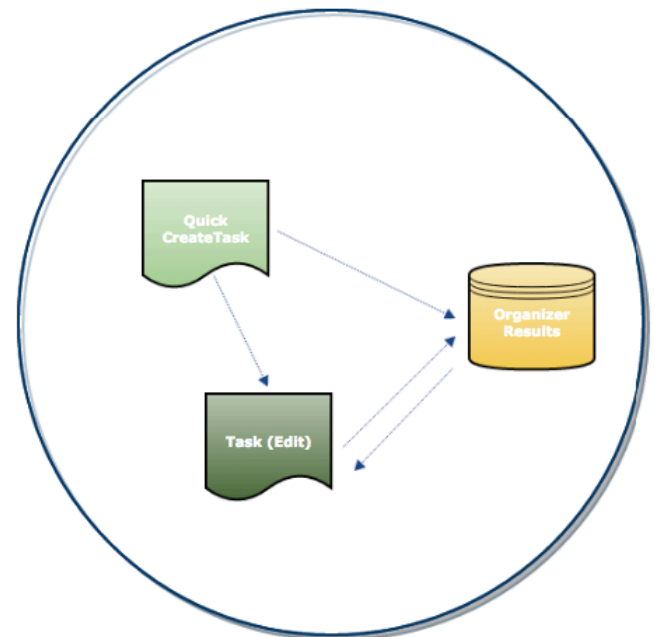
One can view the Notes/Tasks on the Results page from one of three preferences:
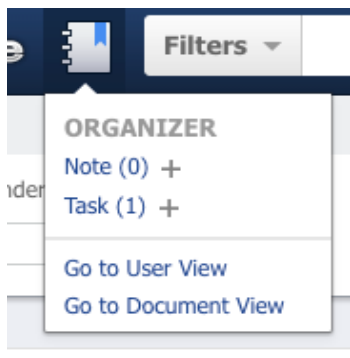


*Seen from the Account View*　　*Seen from the Document View*　　*Seen from the User View*

**Account View**

The Account View displays Notes and Tasks associated to a specific Account and/or Contact. Notes/Tasks for each specific Contact within each Account will be displayed when viewing that individual Contact.  Notes and Tasks created from the "Account View" icon as well as from a specific Account will automatically be assigned to that Account and will show up under the Account view

## Document View

The Document View within the Organizer displays a Task referencing a document within ChannelOnline (Quote, Proposal, Sales Order, Invoice, Purchase Order, or RMA). The document numbers associated with the specific document referenced are used as part of the Task details. A Document View is associated to a Task only.



*Document IDs reference Invoice, Quote, & PO numbers*

## User View

The User View displays Notes and Tasks created by the user. The User View will generally display the greatest total number of Note and Task entries including all unassigned Notes and Personal Tasks.

The User View is the default view for the user when creating a Note or Task from the main Organizer icons or when creating a new Note/Task from the results page.

*Text Chart View*



*Pie Chart View*

## Dashboard

Notes and Tasks are reported and tracked on the company Dashboard.  This Dashboard information is useful as a quick visual reminder for measuring and managing newly created Notes and Tasks.  Notes and Tasks use the priority and date range to determine what is to be displayed.  These date ranges and chart types can be modified by the user under My Account > My Preferences > My Channel Dashboard.
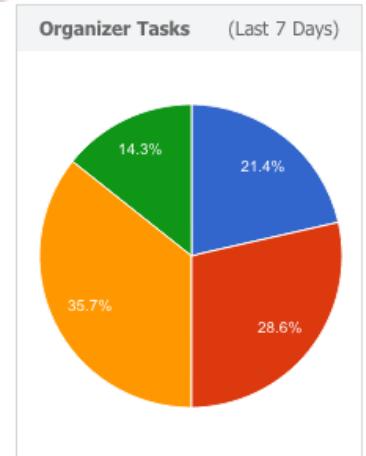
- Date Ranges: Last 90, Last 30, Last 7 & Next 7 (Tasks only), Last 7, Today & Tomorrow (Tasks only), Today.

- Chart Options: Text, Pie, Horizontal, and Vertical.  The two most commonly used and shown here for an example.

## Terminology

| Term | Description |
|------|-------------|
| Account | Classification used to identify client types in ChannelOnline. Accounts in ChannelOnline are classified as follows: Lead, Prospect, Customer, Partner, Vendor, and Generic |
| Account View | Where you can view/edit Notes and Tasks associated to a specific Client Account. |
| Active Account Tab | Icon on main header to create a Quick Create Window Note or Task. Notes or Tasks created here will be labeled with that Account in the header. |
| Active Document Tab | Icon on main header to create a Quick Create Window Task. Tasks created here will be labeled with the Document and Document number in the header. |
| Attribute Fields | Fields located in the header of a Note/Task item on the Edit page that are used for filtering of results. |
| Column Selection | Selector to include or remove field attributes in the Results columns display. |
| Contact(s) | Associates associated to a Customer Account. |
| Convert to Task | Converts an existing Note to a new Task. All references to the Note will now reference the Task. |
| Created by | User who created the Note or Task. |
| Created Date | Date that a Note or Task was created. |
| Dashboard | Comprehensive page within ChannelOnline dedicated to reporting Account metrics. |
| Delegated to | Delegates the current Task to another (Internal) Associate. |
| Document View | In the Organizer, a means to View/Edit Tasks associated to a Document. Documents associated with Tasks include: Quotes, Proposals, Sales Orders, Invoices, Purchase Orders, and RMAs. |
| Documents | Term used to indicate Quotes, Proposals, Sales Orders, Invoices, Purchase Orders, and RMAs within ChannelOnline. |
| Double Arrow | Button feature on the Edit and Results page that toggles the user's view from Edit to Results and back. |

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| | |
|---|---|
| Due Date | Due date assigned to a Task. |
| Edit Assignment | Allows one to "Re-Assign" a Note or Task to another Account or Contact (*Tasks associated to a document cannot be re-assigned)*. |
| Edit Page | The default page to add/edit/view Notes and Tasks within the Organizer. |
| Edit Panel | The text field to the right of the Edit Page |
| Email | Displays email page template.  Users have the option to send the email as HTML or Text.  One can also send the email as an attachment. |
| Expand (button) | Expands the viewing area of an entry or series of entries on the Search Results page. |
| Field Attributes | Properties associated with a Note/Task used for identification and sorting. |
| Header | Dropdown options on Notes/Tasks containing document information, Filter Options, the ability to create another Note/Task, and Account, Document, or User Views. |
| Hide / Show Complete | Allows the user to remove "Completed Tasks" from display on a search.  This feature is available on the Results Page when viewing Tasks. |
| Item Details | Information line for a Note/Task that is displayed above the attribute fields in the header when viewing an item on the Edit page. |
| Modified by | Name of last user to edit the Note or Task. |
| Modified Date | Date of last edit. |
| Note | An item in the Organizer that can be assigned to an Account, Contact, or User that does not use any tracking attributes. (Priority in this instance represents importance.) |
| Organizer | Application housing Tasks and Notes with the ability to create, sort, search, and manage them. |
| Print | Displays the print template.  Options include PDF print preview and system dialog tools to create or save the Note/Task as a PDF. |
| Priority | Assigned priority of Note/Task – Urgent, High, Medium, Low. |
| Progress | Percentage of Task to completion – 10% - 100%.  User can select a specific number and combine with function "Or Greater" |
| Quick Add | Pop-up window to create a Note or Task from within ChannelOnline, allowing you to |

| | |
|---|---|
| Window | navigate within the application and add/edit the item. The Quick Create window can be saved and will then show the corresponding attribute filters. |
| Recycle Bin | Location of deleted items.  User can restore any deleted items back into the organizer's searchable items for display. |
| Reminder Date | Reminder date assigned to a Task. |
| Results Page | Repository for all Notes and Tasks created/delegated to the user with a default date range of 90 days.  Users may sort and filter Notes and Tasks within a result set. |
| Save | Saves the Note/Task.  After initial save, subsequent edits to the Note/Task will automatically save. |
| Sort Panel | The left side of the Edit Page.  The Sort Panel shows the results of a search and allows one to sort the listed entries by date, ID#, Subject, and Priority. |
| Status | Condition of the Task – Active, Planning, Delegated, On Hold, Overdue, Cancelled, Completed. |
| Subject | Subject matter of the Note/Task.  Subject entry is a searchable and sortable field. |
| Tag | User-created Keyword(s) used to identify, organize, and/or sort Note and Task items. |
| Task | An item in the Organizer that can be assigned a due date, delegated, or tracked through the progress attribute. |
| To-Do's | Personal Tasks assigned to the user to complete.  Personal tasks are not tied to any Customer Account or Documents and are meant to help the user manage personal agendas. |
| Type (Item) | Note or Task. |
| User | Person assigned to a ChannelOnline seat/license that is active. |
| User View | All Notes and Tasks created by, assigned or delegated to, a specific user will be searchable under this view. |

## Easy Steps for Creating Notes & Tasks

To create a Note or Task from the main header, hover over the Organizer icon and select the "+" next to either Note or Task.

- Once the organizer Edit Page appears, enter a subject and body of the Note/Task.

- Select "Save" and the Note/Task will be saved as a User note or User task under the User's name. (After the initial save, the document will autosave after each subsequent entry.)

- Optional: Add field attribute information and/or assign Tags.

- Saved Notes and Tasks will appear on the left (Sort) panel on the Edit Page and on the Results Page.

To create a Quick Add Note/Task, hover over the "Account View" or "Active Document" tab from the main header

- Select the "+" next to the Note or Task. As before, one can begin typing in the body of the Note/Task and save the document.

- One also has the option to move the window to the left side of the screen or increase its size by selecting the icons on the top right of the window.

To search or view existing Notes and Tasks from the main header, one can either hover over and click on the Organizer icon or select the number next to either Note or Task.

- Clicking on the Organizer icon directly brings up the Results page where all created Notes and Tasks are displayed sequentially by last modified date. The User has the ability to search for or sort specific Notes/Tasks by manipulating the field attribute filters to narrow their search/sort parameters.

- Selecting the number next to the Note/Task brings up the Results page for Notes or Tasks separately. You have the ability to modify their search process as outlined above or view all entries as Notes or Tasks only.

- Chosen entries from the Results page will take the user back to the Edit page.