Administrative Task

- Activity Types
- Contact Types
- Parcel Types
- Address Types
- Relationship Types
- Membership Types
- Preference Types
- Maintenance Types
- Pet Types
- Department Types
- Location Types
- Trade Types
- Warranty Status
- Unit Locations
- Referral Resources
- Sales Representatives
- Ratings

Activity Types

To create a new activity type, complete the fields for 'Activity Type Name', 'Parent', 'Color', 'Default Responsible', and 'Description', then click 'Submit' to save.

When adding or editing a Activity Type, you typically fill out the following fields:

Activity Type Name – The title or name of the activity.

Parent – The main or higher-level category that the activity type belongs to (useful for organizing related activities).

Color – A visual identifier to easily distinguish activity types in dashboards or calendars.

Default Responsible – The person or team automatically assigned to this type of activity.

Description – Additional details explaining the purpose or nature of the activity type.

Please find attached the video for the Activity Types.

Follow these Steps to navigate and use Activity Types:

lick "Administrative Task"

Click "New Activity Type"

lavigate to the 'Activity Type Name' field, and either select an existing activity type or enter the desired name for the new activity type.

lavigate to the 'Parent' field, and either select an existing activity type or enter the desired name for Parent.

ou may select your preferred color for the color-coding scheme

ssign the appropriate individual as the "Default Responsible".

nter a description, if applicable.

lick "Submit"

Please find the link to the Step-By-Step reference guide for Activity Types. Activity Type.png

? Tips for Activity Types:

Use Clear and Descriptive Names – Ensure each activity type has a name that clearly reflects the task or action it represents**.**

Categorize with Parent Types – Organize activity types under parent categories for easier tracking and reporting.

Assign Default Responsibilities – Set a default responsible person or team to streamline task assignment.

Utilize Color Coding – Apply distinct colors for each activity type to enhance visual organization and quick identification**.**

Provide Relevant Descriptions – Add concise descriptions to clarify the purpose and scope of each activity type.

Review and Update Regularly – Periodically check activity types to ensure they remain accurate, relevant, and aligned with current workflows.

Contact Types

Refer to the categories or classifications of contacts you manage in a system

When adding or editing a Contact Type, you typically fill out the following fields:

- **Name** – The title or specific label of the contact type (e.g., “Customer,” “Vendor,” “Lead”).
- **Description** – A brief explanation of the contact type’s purpose or role within the system.
- **Comments** – Additional notes or relevant information about this contact type.
- **Save Contact** – The action or button used to confirm and store the contact type information in the system.

Please find attached the video for the **Contact Types.**

Follow these Steps to navigate and use Contact Types:

1. **Click "Administrative Task"**
2. **Click "Contact Types"**
3. **Click "New Contact Type"**
4. **Navigate to "Name "field, enter the desired name for the new contact type.**
5. **Add a Description if desired.**
6. **Add a Comment if desired**
7. **Click "Save Contact Type"**

Please find the link to the Step-By-Step reference guide for Contact Types. Contact Types.png

? Tips for Contract Types:

Use Clear and Descriptive Names – Ensure each contact type clearly reflects its purpose.

Provide Meaningful Descriptions – Add a brief description to clarify the role of each contact type.

Utilize Comments Wisely – Use the comments field to include additional context, guidelines, or notes relevant to the contact type.

Be Consistent – Maintain consistent naming conventions and categorization to avoid confusion and ensure accurate reporting.

Review Regularly – Periodically review contact types to ensure they remain relevant and aligned with your current workflows.

Leverage for Automation – Assign default responsibilities or workflows based on contact types to streamline processes.

Parcel Types

Are classifications used to organize and manage different kinds of parcels within a system. Properly defining parcel types ensures efficient tracking, consistent handling, and streamlined logistics operations.

-helps standardize parcel management, improves operational efficiency, and ensures accurate tracking throughout the delivery process.

When adding or editing a Parcel Type, complete the following fields:

- **Name** – Enter a clear and descriptive title for the parcel type.
- **Description** – Provide a concise explanation of the parcel type's purpose or any special handling requirements.
- **Comments** – Include any additional notes or relevant information to assist users in managing the parcel type.
- **Save Parcel Type** – Click this button to confirm and save the parcel type information in the system.

Please find attached the video for the Parcel Types.

Follow these Steps to navigate and use Parcel Types:

1. **Click "Administrative Task"**
2. **Click "Parcel Types"**
3. **Click "New Parcel Type"**
4. **Enter the desired name for the new address type.**
5. **Add a Description if desired**
6. **Add Comments if desired**
7. **Click "Save Parcel Type"**

Please find the link to the Step-By-Step reference guide for Parcel Types. <u>Parcel Types.png</u>

? Tips for Parcel Types:

1. **Use Clear and Descriptive Names – Label each address type clearly.**
2. **Provide Meaningful Descriptions – Add a brief explanation to clarify the purpose or use of each address type.**
3. **Include Comments When Needed – Use the comments field to add relevant notes or special instructions for the address type.**
4. **Maintain Consistency – Use a standardized naming convention to ensure addresses are easy to identify and manage.**
5. **Review Regularly – Periodically check and update address types to keep them accurate and relevant.**
6. **Leverage for Workflow Efficiency – Use address types to assign responsibilities, automate processes, or streamline reporting.**

Address Types

Are used to categorize and organize the different types of addresses managed within the system. To add or edit an address type, complete the fields for Name, Description, and Comments, then click Save Address Type to apply the changes.

- help standardize how addresses are categorized, making it easier to manage contact information efficiently and accurately within the system.

When adding or editing a Address Type, you typically fill out the following fields:

- **Name** – Enter a clear and descriptive title for the address type.
- **Description** – Provide additional details explaining the purpose or context of this address type.
- **Comments** – Add any notes or relevant information that may help users understand or use the address type correctly.
- **Save Address Type** – Click this button to save and apply your changes to the system.

Please find attached the video for the Address Types.

Follow these Steps to navigate and use Address Types:

1. **Click "Administrative Task"**
2. **Click "Address Types"**
3. **Click "New Address Type"**
4. **Navigate to "Name "field, enter the desired name for the new Address type.**
5. **Add a Description if desired.**
6. **Add a Comment if desired**
7. **Click "Save Address Type"**

Please find the link to the Step-By-Step reference guide for Address Types. Address Type.png

? Tips for Address Types:

Use Clear and Descriptive Names – Label each address type clearly.

Provide Relevant Descriptions – Add a brief description to clarify the purpose of each address type.

Add Comments When Necessary – Use the comments field for additional context or notes about the address type.

Organize Systematically – Maintain consistent naming and categorization to make addresses easy to track and manage.

Review Regularly – Periodically update address types to ensure they remain accurate and relevant.

Relationship Types

Classifications used to define and manage the nature of relationships between contacts, accounts, or entities within a system. Clearly defining relationship types helps maintain organized records, supports accurate reporting, and facilitates better communication and workflow management.

- Ensures that interactions between contacts and entities are properly categorized, enhances data organization, and supports efficient management and reporting of relationships within the system.

When adding or editing a Relationship Type, you typically fill out the following fields:

- **Name** – Enter a clear and descriptive title for the relationship type.
- **Description** – Provide a brief explanation of the relationship type's purpose or context, highlighting its role within the system.
- **Comments** – Include any additional notes or relevant information to help users understand the relationship type and its proper use.
- **Save Relationship Type** – Click this button to confirm and store the relationship type information in the system.

Please find attached the video for the Relationship Types.

Follow these Steps to navigate and use Relationship Types:

1. **Click "Administrative Task"**
2. **Click "Relationship Types"**
3. **Click "New Relationship Type"**
4. **Enter the desired name for the new Relationship type.**
5. **Add a Description if desired**
6. **Add Comments if desired**
7. **Click "Save Relationship Type"**

Please find the link to the Step-By-Step reference guide for Relationship Types.

Relationship Types.png

? Tips for Relationship Types:

1. **Use Clear and Descriptive Names – Ensure each relationship type clearly reflects the connection.**

2. **Provide Meaningful Descriptions – Add a brief description to clarify the purpose or role of each relationship type.**

3. **Include Comments When Necessary – Use the comments field for additional context, guidelines, or special instructions.**

4. **Maintain Consistency – Apply standardized naming conventions to avoid confusion and ensure accurate reporting.**

5. **Review Regularly – Periodically evaluate relationship types to ensure they remain relevant and aligned with current workflows.**

6. **Leverage for Automation and Workflow – Assign responsibilities or workflows based on relationship types to streamline processes.**

Membership Types

Are categories used to define and manage different levels or classifications of memberships within a system. These types help organize members based on their privileges, duration, status, or benefits, making it easier to track and maintain membership records effectively.

When adding or editing a Membership Type, you typically complete the following fields:

- **Name – Enter a clear and descriptive title for the membership type.**
- **Description – Provide a brief explanation outlining the purpose, benefits, or conditions associated with this membership type.**
- **Comments – Include any additional notes or relevant information to assist users in understanding or managing this membership type.**
- **Save Membership Type – Click this button to confirm and store the membership type information in the system.**

Please find attached the video for the Membership Types.

Follow these Steps to navigate and use Membership Types:

1. **Click "Administrative Task"**

2. **Click "Membership Types"**

3. **Click "New Membership Type"**

4. **Enter the desired name for the new Membership type.**

5. **Add a Description if desired**

6. **Add Comments if desired**

7. **Click "Save Membership Type"**

Please find the link to the Step-By-Step reference guide for Membership Types.

Membership Types.png

? Tips for Membership Types:

1. **Use Clear and Consistent Names – Choose straightforward and recognizable names (e.g., “Basic,” “Premium,” “Corporate”) to make each membership type easy to identify.**

2. **Provide Detailed Descriptions – Clearly explain what each membership type includes, such as benefits, duration, or eligibility requirements.**

3. **Utilize the Comments Field – Add any additional notes, renewal conditions, or internal guidelines that help clarify membership management.**

4. **Maintain Consistency Across the System – Apply standardized naming and formatting to avoid confusion and ensure accurate tracking.**

5. **Review and Update Regularly – Periodically revisit membership types to ensure they align with current policies, offerings, and member needs.**

6. **Align with Organizational Goals – Design membership types that reflect your organization’s structure, services, and customer engagement strategy.**

7. **Leverage for Reporting and Analytics – Use membership types to generate insights on member distribution, retention, and growth trends.**

Preference Types

Classifications used to define and organize different kinds of user or system preferences within a platform. They help in customizing user experiences, managing settings, and standardizing configurable options based on organizational needs. Clearly defining preference types ensures consistency, clarity, and efficiency in managing user settings or preferences.

When adding or editing a Preference Type, you typically complete the following fields:

- **Preference Type Name** – Enter a clear and descriptive name for the preference type (e.g., “Notification Settings,” “Language Preference,” “Theme Selection”).
- **Parent** – Select the parent category under which the preference type belongs, if applicable. This helps in grouping related preferences for easier management.
- **Description** – Provide a brief explanation of the purpose or function of the preference type to ensure clarity for users and administrators.
- **Save Preference Type** – Click this button to confirm and store the preference type details in the system.

Please find attached the video for the Preference Types.

Follow these Steps to navigate and use **Preference Types**:

1. **Click "Administrative Task"**
2. **Click "Preference Types"**
3. **Click "New Membership Type"**
4. **Enter the desired “Preference Type Name”**
5. **Enter/Choose the desired “Parent”**
6. **Add a Description if desired**
7. **Click "Save Preference Type"**

Please find the link to the Step-By-Step reference guide for Preference Types. Preference Types.png

? Tips for Preference Types:

1. **Use Clear and Descriptive Names – Choose names that clearly indicate the purpose of the preference (e.g., “Email Notifications,” “Language Settings”).**

2. **Organize with Parent Categories – Group related preferences under appropriate parent categories to keep settings structured and easy to manage.**

3. **Provide Concise Descriptions – Clearly describe what each preference type controls or affects to help users understand its function.**

4. **Maintain Consistency – Follow a standard naming and formatting convention to ensure uniformity across all preference types.**

5. **Review and Update Regularly – Periodically check preference types to ensure they remain relevant and aligned with current user needs and system updates.**

6. **Simplify User Experience – Create preference types that make configuration intuitive and reduce user confusion.**

Maintenance Types

Are classifications used to organize and manage various maintenance activities within an organization. Each type includes essential details to ensure proper tracking, planning, and execution of maintenance tasks.

When adding or editing a Maintenance Type, you are required to complete the following fields:

- **Name** – Enter a clear and descriptive title for the maintenance type.
- **Description** – Provide a concise explanation of the maintenance type's purpose or context, outlining its role within the system or maintenance process.
- **Comments** – Add any relevant notes, instructions, or additional information that will help users understand how and when this maintenance type should be applied.
- **Save Maintenance Type** – Click this button to confirm and store the maintenance type details in the system.

Please find attached the video for the Maintenance Types.

Follow these Steps to navigate and use Maintenance Types:

1. **Click "Administrative Task"**
2. **Click "Maintenance Types"**
3. **Click "New Maintenance Type"**
4. **Enter the desired "Maintenance Type Name"**
5. **Add a Description if desired**
6. **Click "Save Maintenance Type"**

Please find the link to the Step-By-Step reference guide for Preference Types.

Maintenance Types.pdf

? Tips for Maintenance Types:

- **Use clear and consistent naming conventions.**
  Choose descriptive names that make it easy for users to identify the purpose of each maintenance type (e.g., *Preventive – Equipment Check* rather than just *Check*).
- **Provide concise but informative descriptions.**
  Summarize what the maintenance type is used for and when it should be applied. Avoid

overly technical jargon unless necessary.

- **Add helpful comments for context.**
  Use the comments field to include special notes, procedures, or reminders that can guide users in selecting the correct maintenance type.
- **Review and update regularly.**
  Periodically check maintenance types to ensure they remain relevant to current operations, standards, and equipment needs.

Pet Types

Allows users to define and manage standardized categories of animals within the system. This ensures consistency and accuracy across pet-related records such as registration, medical history, and reporting.

When adding or editing a Pet Types, you are required to complete the following fields:

- **Name** – Enter a clear and descriptive title for the pet type (e.g., Dog, Cat, Bird).
- **Description** – Provide a concise overview of the pet type, highlighting key traits or context (e.g., “Domesticated canine species commonly kept for companionship and security”).
- **Comments** – Include any additional notes, care instructions, or special considerations to guide users on proper use.
- **Save Pet Type** – Click this button to confirm and store the pet type details in the system. Once saved, the new or updated pet type will be available across relevant modules.

Please find attached the video for the Pet Types.

Follow these Steps to navigate and use Pet Types:

1. Click "Administrative Task"

2. Click "Pet Types"

3. Click "New Pet Type"

4. Enter the desired “Pet Type Name”

5. Add a Description if desired

6. Click "Save Pet Type"

Please find the link to the Step-By-Step reference guide for Pet Types. **Pet Types.pdf**

Tips for Pet Types:

- Use **clear and consistent names** for each pet type to make searching and categorization easier (e.g., *Dog – Small Breed*, *Dog – Large Breed*).

- Provide **concise and informative descriptions** that clearly explain the pet type’s characteristics or purpose.
- Include **helpful notes in the Comments field**, such as care instructions, medical reminders, or documentation guidance.
- **Review and update regularly** to ensure pet type information remains accurate and relevant.
- **Avoid duplicates** by checking existing entries before creating a new pet type.
- Ensure all new or updated pet types are **saved properly** using the **Save Pet Type** button so they are available in all relevant modules.

Department Types

Used to categorize and manage organizational units within the system. Proper configuration ensures consistency in workflow assignments, reporting, and overall organizational management.

When adding or editing a Department Types, you are required to complete the following fields:

- **Name** – Enter a clear and descriptive title for the department type to ensure easy identification.
  Example: Human Resources, Finance, IT Support, Operations
- **Description** – Provide a concise explanation of the department's function, scope, and responsibilities.
  Example: The Human Resources department oversees recruitment, employee relations, and training programs.
- **Comments** – Include any additional notes, internal procedures, or special instructions to assist users.
  Example: HR handles onboarding, performance appraisals, and employee benefits.
- **Save Department Type** – Click this button to confirm and store the department type. Once saved, it will be available for assignment across all relevant modules.

Please find attached the video for the Department Types.

Follow these Steps to navigate and use Department Types:

1. **Click "Administrative Task"**

2. **Click "Department Types"**

3. **Click "New Department Type"**

4. **Enter the desired "Department Type Name"**

5. **Add a Description if desired**

6. **Click "Save Department Type"**

Please find the link to the Step-By-Step reference guide for Department Types.

Department Types.pdf

Tips for Department Types:

- **Use clear and consistent names** to ensure departments are easily identifiable (e.g., *Finance – Accounts Payable*, *Finance – Accounts Receivable*).
- **Provide concise and informative descriptions** that clearly define each department's responsibilities and scope.
- **Include helpful notes in the Comments field** for internal procedures, workflow instructions, or special considerations.
- **Review and update periodically** to reflect organizational changes or updated responsibilities.

Location Types

Helps standardize data entry, streamline workflows, improve reporting accuracy, and facilitate operational management, identify the role of a location within the organization, such as whether it is used for storage, operations, customer service, or administrative purposes and provides clarity for auditing, safety, and regulatory purposes.

When adding or editing a Location Type, you typically fill out the following fields:

- **Name** – Enter a clear and descriptive title for the location type to make it easily identifiable.
  Example: Warehouse, Office, Retail Store, Distribution Center
- **Description** – Provide a concise explanation of the location type, including its purpose and role within the organization.
  Example: Warehouse locations are designated for storage and inventory management of goods.
- **Comments** – Include any additional notes, internal instructions, or relevant information to guide users in properly applying the location type.
  Example: Retail Stores require regular inventory audits and customer service monitoring.
- **Save Location Type** – Click this button to confirm and store the location type. Once saved, it will be available for selection across relevant modules and workflows.

Please find attached the video for the Location Types.

Follow these Steps to navigate and use Location Types:

1. **Click "Administrative Task"**
2. **Click "Location Types"**
3. **Click "New Location Type"**
4. **Enter the desired “Location Type Name”**
5. **Add a Description if desired**
6. **Add a Comment if desired**
7. **Click "Save Location Type"**

Please find the link to the Step-By-Step reference guide for Location Types. **Location Types.pdf**

Tips for Location Types:

- **Choose clear and descriptive names** for each location type to ensure easy identification (e.g., *Warehouse, Office, Retail Store*).
- **Write meaningful descriptions** that clearly convey the purpose and role of the location type within the organization.
- **Add relevant notes in the Comments field** to provide guidance on special instructions, workflows, or internal procedures.
- **Ensure consistency across all entries** to standardize data entry, minimize errors, and avoid confusion.
- **Regularly review and update** location types to keep information accurate and aligned with operational or organizational changes.

Trade Types

Trade Types are predefined categories used to classify and organize the various skilled services or technical work required within the system. These classifications ensure that tasks, work orders, maintenance activities, and operational requests are routed to the appropriate personnel or departments.

Trade Types help maintain consistency, improve reporting accuracy, and streamline workflow assignment across all modules.

- Provide a standardized list of skilled service categories
- Ensure tasks are assigned to the correct trade or specialist
- Support efficient maintenance and operational workflows
- Improve clarity in reporting, analytics, and documentation
- Help administrators manage and configure service-related tasks

The **Trade Types** section has been fully documented and refined with the following fields:

- **Name** – Specifies the official title of the Trade Type for accurate identification and selection across the system.
- **Description** – Provides a clear explanation of the trade’s purpose, scope, and activities to ensure consistent understanding among users.
- **Comments** – Allows the addition of any relevant notes, instructions, or internal remarks to support clarity and communication.
- **Save Trade Type** – Confirms and records the new or updated Trade Type in the system, making it available for use in related modules.

Please find attached the video for the Trade Types.

Follow these Steps to navigate and use Trade Types: Trade Types.pdf

1. **Click "Administrative Task"**

2. **Click "Trade Types"**

3. **Click "New Trade Type"**

4. **Enter the desired “Trade Type Name”**

5. **Add a Description if desired**

6. **Add a Comment if desired**

7. Click "Save Trade Type"

Tips for Trade Types:

- **Use clear and specific names**
  Choose trade names that are easy to recognize (e.g., *Electrical*, *Plumbing*, *HVAC*) to ensure quick and accurate task assignment.
- **Provide concise but meaningful descriptions**
  Keep descriptions focused on the trade's responsibilities so users understand when each trade should be selected.
- **Avoid duplicate or overlapping trade categories**
  Ensure each trade is unique to prevent confusion and maintain clean reporting.
- **Use the Comments field for internal notes**
  Add instructions, exceptions, or workflow notes to help teams understand special requirements for a specific trade.
- **Review trade types periodically**
  Update or refine trade types as your operations evolve, ensuring they remain accurate and relevant.
- **Align trade types with workflows**
  Make sure they match your maintenance or service processes so the correct personnel receive the correct tasks.
- **Test after adding new trade types**
  Verify that new trades appear correctly in work orders, filters, and reports before finalizing.
- **Ensure access control is in place**
  Allow only authorized users (admins) to add, edit, or remove trade types to maintain data integrity.

Warranty Status

The **Warranty Status** section allows administrators to define and manage the different statuses used to track warranty requests, warranty claims, and warranty-related processes. Clear status definitions ensure consistent reporting, smooth workflow transitions, and accurate communication between users, residents, and administrators.

When adding or editing a Warranty Status, you typically fill out the following fields:

- **Color -** Color coding helps users quickly identify the status of warranty requests, improving visibility, reducing errors, and speeding up workflow decisions. Each status is assigned a distinct color to represent its meaning at a glance.
- **Name** – Identifies the specific warranty status (e.g., Pending, Approved, Completed). Used across all warranty modules for selection and reporting.
- **Description** – Provides a detailed explanation of what the status represents to ensure proper usage throughout the warranty process.
- **Comments** – Allows additional notes or internal instructions related to the status for improved clarity and communication.
- **Save Warranty Status** – Finalizes and records the new or updated warranty status, making it available for system-wide use.

Please find attached the video for the Warranty Status.

Follow these Steps to navigate and use **Warranty Status**:

1. Click "Administrative Task"

2. Click "Warranty Status"

3. Click "New Warranty Status"

4. Assign a distinct color to each Warranty Status to facilitate quick and easy identification.

5. Enter the desired “Warranty Status Name”

6. Add a Description if desired

7. Add a Comment if desired

8. Click "Save Warranty Status"

Tips for Warranty Status:

- **Use clear and concise names**
  Choose status names that are easy to understand (e.g., *Pending*, *Approved*, *In Progress*, *Completed*, *Rejected*). This ensures users can quickly select and recognize the appropriate status.
- **Provide meaningful descriptions**
  Include a description that clearly explains the purpose of each status and when it should be applied. This reduces confusion and ensures consistent usage.
- **Leverage the Comments field**
  Use comments for internal notes, special instructions, or workflow clarifications that help team members handle warranty requests correctly.
- **Maintain a logical workflow**
  Define statuses in a sequence that reflects the actual warranty process to make tracking progress intuitive.
- **Avoid duplicates**
  Ensure each status is unique to prevent reporting errors and maintain clean system data.
- **Review periodically**
  Regularly update or refine warranty statuses to reflect changes in procedures, policies, or system requirements.
- **Validate before saving**
  Check that all required fields (Name, Description) are correctly filled and that the status aligns with organizational standards before saving.
- **Restrict editing access**
  Limit creation and modification of warranty statuses to authorized personnel to maintain data integrity.

Unit Locations

The **Unit Locations** section is used to define, manage, and track the various physical or virtual units within a property, facility, or system. Properly defining unit locations ensures accurate recordkeeping, reporting, and assignment of tasks, assets, or responsibilities.

The **Unit Locations** section has been fully documented and refined with the following fields:

- **Name** – Identifies the specific unit location (e.g., *Building A – Floor 1 – Unit 101*). This is used across all relevant modules for **selection, reporting, and assignment purposes.**
- **Description – Provides a detailed explanation of the unit location, including its type, purpose, or distinguishing characteristics, to ensure proper understanding and usage.**
- **Comments – Allows additional notes or instructions related to the unit location, improving clarity and communication among users and administrators.**
- **Save Unit Locations – Finalizes and records the new or updated unit location, making it available system-wide for use in asset management, maintenance, resident assignments, and reporting.**

Please find attached the video for the Unit Locations.

Follow these Steps to navigate and use Unit Locations:

1. Click "Administrative Task"

2. Click "Unit Locations"

3. Click new "Unit Location"

4. Enter the desired “Unit Locations”

5. Add a Description if desired

6. Add a Comment if desired

7. Click "Save Unit Location"

Follow these Steps to navigate and use Unit Locations: Unit Locations.pdf

Tips for Unit Locations:

- **Use clear and unique names**
  Assign names that clearly identify each unit location (e.g., *Building A – Floor 1 – Unit 101*) to avoid confusion.
- **Provide detailed descriptions**
  Include relevant information such as unit type, purpose, size, or distinguishing features to ensure accurate understanding.
- **Utilize the Comments field effectively**
  Add notes for special access instructions, maintenance requirements, occupancy restrictions, or other important details.
- **Maintain consistency**
  Follow a standardized naming and description format across all units to improve searchability, reporting, and workflow assignment.
- **Regularly review and update**
  Periodically verify that unit location details are accurate and reflect any changes in occupancy, layout, or usage.
- **Validate before saving**
  Ensure all required fields are completed and that unit names are unique before saving to maintain data integrity.
- **Integrate with workflows**
  Make sure unit locations are properly linked to related modules such as maintenance tasks, asset tracking, or resident management.

Referral Resources

The **Referral Sources** section allows administrators to define and manage the origins or channels through which clients, residents, or users are referred to the organization or system. Properly managing referral sources ensures accurate tracking, reporting, and analysis of marketing, outreach, and engagement efforts.

When adding or editing a **Referral Sources**, you typically fill out the following fields:

- **Name** – Identifies the specific referral source (e.g., *Online Advertisement*, *Friend Referral*). This is used across all relevant modules for selection, reporting, and analytics.
- **Description** – Provides a detailed explanation of the referral source, including context or purpose, to ensure proper usage and understanding.
- **Comments** – Allows additional notes or internal instructions related to the referral source, improving clarity and communication among users and administrators.
- **Save Referral Source** – Finalizes and records the new or updated referral source, making it available system-wide for use in intake, registration, and reporting processes.

Please find attached the video for the Referral Sources.

Follow these Steps to navigate and use Referral Sources:

1. Click "Administrative Task"

2. Click "Referral Sources"

3. Click new "Referral Source"

4. Enter the desired “Referral Source” Name

5. Add a Description if desired

6. Add a Comment if desired

7. Click "Save Referral Source"

Follow these Steps to navigate and use Referral Sources: Referral Sources.pdf

Tips for Referral Sources:

- **Use clear and descriptive names**
  Assign names that clearly identify each referral source (e.g., *Online Advertisement*, *Friend*

Referral, *Social Media Campaign*) to avoid confusion and ensure accurate tracking.

- **Provide meaningful descriptions**
  Include context or details about the referral source to help users and administrators understand its purpose and origin.
- **Leverage the Comments field**
  Use comments to add internal notes, special instructions, historical performance, or other relevant observations.
- **Maintain consistency**
  Follow a standard naming and description format across all referral sources to improve reporting, analytics, and workflow integration.
- **Validate before saving**
  Ensure all required fields are completed and that names are unique before saving to maintain data integrity.
- **Review periodically**
  Regularly update referral sources to reflect new campaigns, channels, or changes in outreach strategy.
- **Integrate with workflows**
  Make sure referral sources are correctly linked to intake forms, registration modules, and reporting tools for accurate data collection.

Sales Representatives

The **Sales Representatives** section allows administrators to define and manage individuals or teams responsible for driving sales, client engagement, and business development. Properly managing sales representatives ensures accurate assignment of leads, tracking of performance, and efficient reporting.

The **Sales representatives** section has been fully documented and refined with the following fields:

- **Name** – Identifies the sales representative or team (e.g., *John Doe*, *Jane Smith*). This is used across all relevant modules for lead assignments, sales tracking, and reporting.
- **Description** – Provides detailed information about the representative, such as role, territory, specialization, or responsibilities, to ensure proper usage and understanding.
- **Comments** – Allows additional notes or internal instructions related to the sales representative, improving clarity and communication among users and administrators.
- **Save Sales Representatives** – Finalizes and records the new or updated sales representative, making them available system-wide for lead assignments, performance tracking, and reporting.

Please find attached the video for the Sales Representatives.

Follow these Steps to navigate and use Sales Representatives:

1. Click "Administrative Task"

2. Click "Sales Representatives"

3. Click new "Sales Representative"

4. Enter the desired “Sales Representative” Name

5. Add a Description if desired

6. Add a Comment if desired

7. Click "Save Sales Representative"

Follow these Steps to navigate and use Sales Representatives: Sales Representatives.pdf

Tips for Sales Representatives:

- **Use clear and complete names**
  Enter the full name of each sales representative (e.g., *John Doe*) to ensure accurate assignment, tracking, and reporting.
- **Provide detailed descriptions**
  Include relevant details such as role, territory, specialization, or responsibilities to clarify each representative's scope and accountability.
- **Leverage the Comments field**
  Use comments for internal notes, special client instructions, performance highlights, or availability details.
- **Maintain consistency**
  Follow a standardized naming and description format across all representatives for easier reporting and workflow integration.
- **Validate before saving**
  Ensure all required fields are completed and that names are unique to maintain data integrity and avoid duplicates.
- **Assign appropriately**
  Link sales representatives to the correct leads, territories, or modules to ensure proper workflow and accountability.
- **Review periodically**
  Update information as needed to reflect changes in assignments, responsibilities, or personnel.

Ratings

The **Ratings** section allows administrators to define and manage evaluation or performance levels used across various modules, such as service quality, user feedback, employee performance, or asset condition. Clear definitions and proper usage of ratings ensure consistent assessment, reporting, and decision-making.

When adding or editing a **Ratings**, you typically fill out the following fields:

- **Name** – Identifies the specific rating level (e.g., *Excellent*, *Good*, *Fair*, *Poor*). This is used across all relevant modules for selection, reporting, and analytics.
- **Description** – Provides detailed information about what each rating represents, ensuring proper interpretation and consistent usage across the system.
- **Comments** – Allows additional notes or internal instructions related to the rating, enhancing clarity and communication among users and administrators.
- **Save Rating** – Finalizes and records the new or updated rating, making it available system-wide for all relevant evaluation and feedback modules.

Please find attached the video for the Ratings.

Follow these Steps to navigate and use Ratings:

1. Click "Administrative Task"

2. Click "Ratings"

3. Click new "Rating"

4. Enter the desired “Rating” Name

5. Add a Description if desired

6. Add a Comment if desired

7. Click "Save Rating"

Follow these Steps to navigate and use Ratings: Ratings.pdf

 Tips for Ratings:

- **Define ratings clearly**
  Ensure each rating has a distinct name and meaning (e.g., *Excellent*, *Good*, *Average*, *Poor*) to avoid ambiguity.

- **Provide contextual descriptions**
  Describe what each rating represents to guide users in selecting the appropriate level consistently.
- **Use comments for clarity**
  Include additional notes or examples in the Comments field to support evaluators and internal teams.
- **Maintain consistency across modules**
  Apply the same rating system throughout all relevant areas, such as performance, feedback, or quality checks, for uniform reporting.