



## 7.0 Agenda Enhancements

Agenda DONE Status Bar Tutorial: <https://www.useloom.com/share/0e50de94a7e641d1a26712fccbd135d8>







Agenda To Do List Filter by Type Tutorial: <https://www.useloom.com/share/c077df22319042ddb12e6e8dbf08f3ce>


Agenda To Do List Club Defined Filters Tutorial: <https://www.useloom.com/share/0daf4b37616042bf85f5a27ea37f3ef3>

*what's new?* DONE (a new status bar)

*where?* top right of Agenda

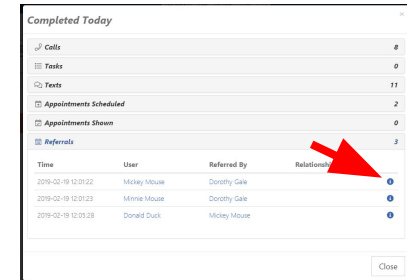
*why?* Gives visibility to what has been completed

-  Calls (count of calls initiated through call bridge)
-  Task (steps completed)
-  Text (sent messages)
-  Appointments Created
-  Appointment Shows
-  Referrals Added (unique, new referral added)

*tip!* DONE status will refresh every 5 minutes or  reload the page to see DONE items add up

# new! DONE detail

- Click the DONE status bar to see detail
- Click a specific item type to see a list of activities
- Click the iModal for more info



217083121

ID	5060580
SenderID	5050962
ExcludeEmail	1
message	Hello Amy - I wanted to see when you could stop in to get your membership going.
ClubID	6
Account	2092177
Subdomain	dev
page	/api/message/send
type	text
joinType	Walk-in
Status	DGR Lead

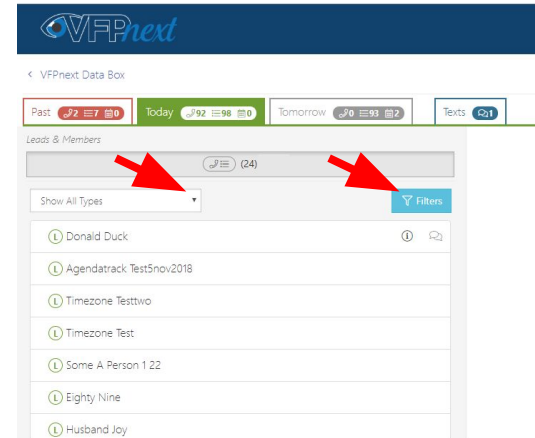
# *new!* AGENDA Organization

*what's new?* Ability to filter Agenda Items by Type or a Club defined filter

*where?* Just above Agenda List

*why?* Allows Agenda items to be performed in order of importance

*tip!* Chat or Email Support to add custom filters



The screenshot displays the VFPnext interface. At the top, there is a dark blue header with the VFPnext logo. Below the header, there is a navigation bar with tabs for 'Past', 'Today', 'Tomorrow', and 'Texts'. The 'Today' tab is active, showing a date of 11/20/18. Below the navigation bar, there is a section titled 'Leads & Members' with a sub-header '(24)'. A dropdown menu is open, showing 'Show All Types' and a 'Filters' button. Two red arrows point to the dropdown menu and the 'Filters' button. Below the dropdown, there is a list of agenda items:

- Donald Duck
- Agendatrack Test5Nov2018
- Timezone Testtwo
- Timezone Test
- Some A Person 1 22
- Eighty Nine
- Husband Joy

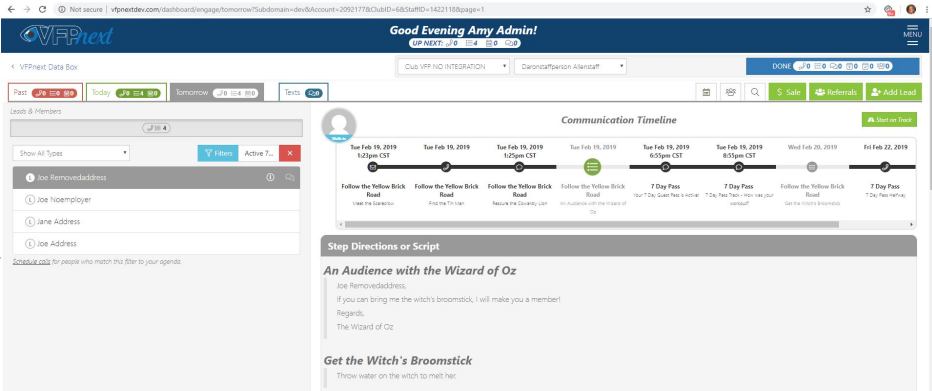
# new! AGENDA Organization

*what's new?* Ability to add calls to Agenda based on Club defined filter

*where?* Apply Club defined filter, click Schedule Calls below the Agenda List

*why?* Add calls for new staff, focus on the most important items

*tip!* Chat or Email Support to add custom filters



The screenshot displays the VFPnext web interface. At the top, there's a navigation bar with the VFPnext logo and the user name 'Good Evening Amy Admin!'. Below this, there's a 'Leads & Members' section on the left, which includes a search bar and a list of members. A red arrow points to the 'Schedule calls' link at the bottom of this list. On the right, there's a 'Communication Timeline' section showing a series of events over time, including 'Follow the Yellow Brick Road' and '7 Day Pass'. Below the timeline, there's a 'Step Directions or Script' section with text for 'An Audience with the Wizard of Oz' and 'Get the Witch's Broomstick'.