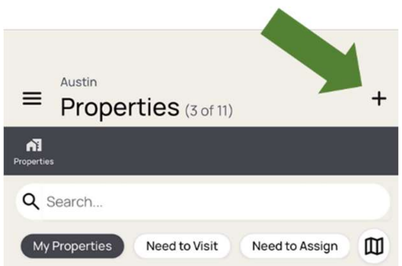
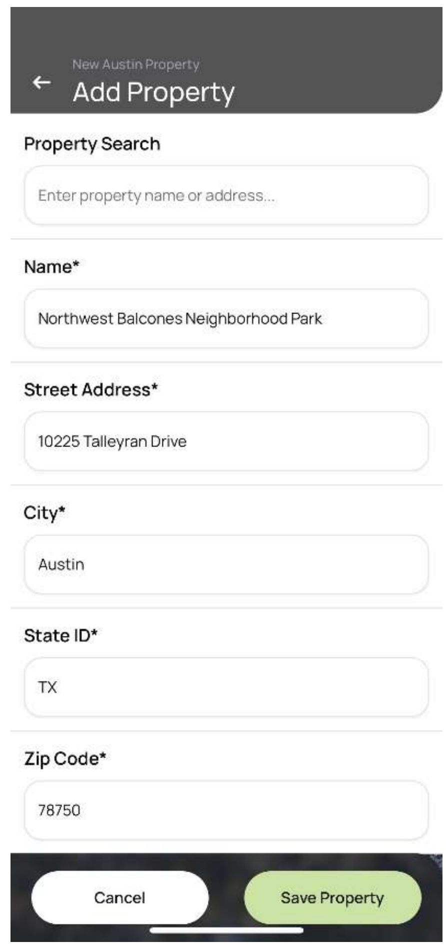
Account Manager Quick Start – Capture Issues in Quick Mode

You've arrived at a property where you are the Account Manager and have logged into Operate for the first time. You are about to walk the property to see if there are any Issues that require attention. What do you do? Here's how to get started.

1. Create or Select the Property you are about to walk.

You start out in the *Properties* view. The default when you first log in is to see a list view of the *Properties* where you are the *Account Manager*. If the Property you want to walk is not yet in the system, you can add a new *Property* from here. It will then be permanently available for future visits.





Click the + to create a new Property. For a new Property, provide a name and address and it will be created for you with a mapped location and cover picture.

If the Property already exists in the system, or after you create one, it will be listed and mapped in the *Properties* View.

Select the *Property* to add *Issues* to from the *Properties* View:

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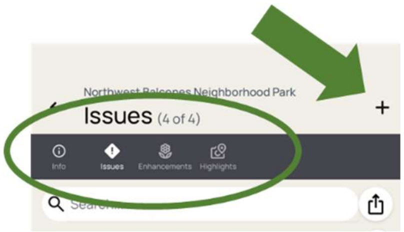
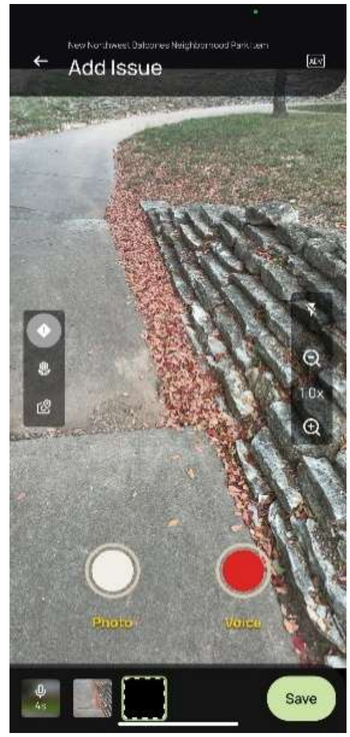
2. Create Issues for the Property in Quick Mode

Once you are in the Property, start your walk. If you see an Issue, document it for correction.



Select Issues, click the + and you're in Quick Mode for capturing Issues.

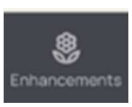
Take a picture of the Issue and **make a voice recording**.

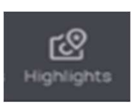


Select Save to add the Issue to the Property. Operate will automatically provide a name, description and set other fields based on your recording for you to review.

On Save a new Issue is opened in Quick Mode so you can continue your walk.

When you have no more Issues to add, select the back arrow button. You will be asked if you want to cancel the last Issue that was opened for you, confirm Yes.





***Note**: Issues are the default and are used to document problems with the service that need to be addressed. You can also create Enhancements to document upsell opportunities, and Highlights to document accomplishments or aspects of the property to be discussed. The process is the same, the information captured varies appropriately.*

***Note**: There is also an advanced mode enabled at the top of the new Issue pane that lets you both create and fully review a new Issue at the same time.*

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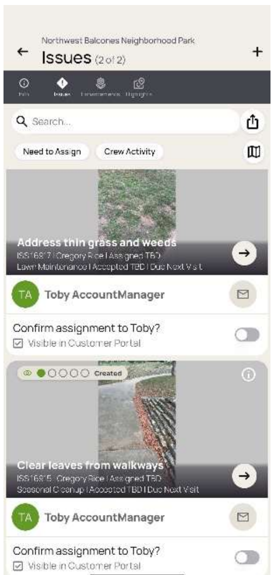
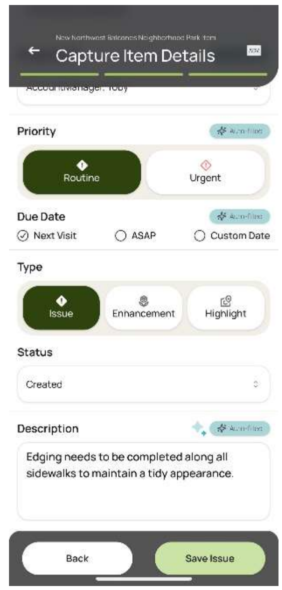
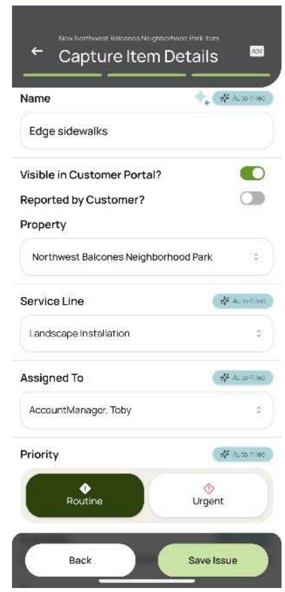
3. Review this visit's Issues

When you get back to your truck or the office, review the issues that you just created. Select Issues to review from the Property Issue List by clicking the right arrow. Edit Issues by clicking the Pencil. Save when done.







***Note**: One important setting to review is the person "Assigned To". The system makes an attempt to identify who will be assigned to address this Issue. You can leave it or change it. Once it is correct, select the "Confirm Assignment to [Name]" toggle. This will notify that user of the Issue they have been signed and initiate the workflow to completion.*

***Note**: Filters are very important when you are looking at Property or Issue, Enhancement or Highlight lists. Each filter can be individually toggled on and off and used in combination with other filters.*