Knowledge Base Article

Article ID: **4175**
Subject: **Setting up and the Using Default Progress Report Activity List**
Last Modified: **October 1, 2009**

Applies to: **Pro Gold i2 3.xx**

Purpose: The Default Progress Report Activity automatically adds default activities to the marketing tab of properties when they are first added to Pro Gold i2. Instead of adding these activities to a property manually, the default list adds them automatically to the property. This allows a list of activities to be established on a property for the seller progress report. In order to ensure that the default activity is correct on newly added properties, it is strongly recommended that the Default Progress Report Activity list be setup prior to adding or importing properties into Pro Gold i2.

Procedure: The Default Progress Report Activity creates a template list for each type of property. Therefore, when setting up the default, create a list of items for each property type that will be used- Commercial, Commercial Land, Exempt, Multi Family, New Construction, Other, Rental, Residential, and Vacant Land.

- Setup Default Progress Report Activity
    - Under the **Settings and Utilities** menu, select **Company Defaults** icon and click on the **Lists 1** tab
    - The **Default Progress Report Activity** list is in the bottom left quadrant of the screen
    - Add default progress report activity items for each property type that will be used in Pro Gold i2
        - It is recommended to keep activities for each property type together in order to better view what will appear in the list for each property
        - A sample list of items already appears in the **Default Progress Report Activity** list. These items can be changed and/or deleted
            - Delete unwanted items by clicking the red "**X**" next to the item to be deleted
    - Add only those activities that apply to all or most of the properties of a certain type. (For example, if all residential properties are listed in the MLS, then add that as a default activity.)
    - Note: Items can be added to the "**Media**" and "**Activity**" drop-downs by double-clicking in either field and adding a new entry to the list
        - Double-click in the **Media** or **Activity** field to access the entry list
        - Use the arrows at the bottom of the screen to scroll through the existing entries
        - Add a new entry to the list by clicking "New" and typing the entry into the blank field that appears
        - Click **Done** button to close the screen
    - When all items have been added to the **Default Progress Report Activity** list, click the **Done** button in the bottom right corner of the screen to close the screen

References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com/webcast.aspx

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

Keywords: Setup Default Progress Report Activity, Seller Progress Report, New, 4175