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Article ID: 4176
Subject: Setting up and the Using Default Progress Report Activity List
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Applies to: Pro Gold XP 2.0

Issue: The Default Progress Report Activity automatically adds default activities to the marketing tab of properties when they are first added to Pro Gold XP. 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 XP.

Resolution: 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 **Setup Tab**, select **"Change Company Info"** and click on the **"Lists 1"** tab.
 - Click on the **"Default Progress Report Activity"** button in the bottom left corner of the screen.
 - The "Default Progress Report Activity" screen will appear.
 - Add default progress report activity items for each property type that will be used in Pro Gold XP.
 - Use the "Quick Find" at the top of the screen to select a property type and 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.
 - 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" to close the screen.
 - When all items have been added to the "Default Progress Report Activity" list, click **"Done"** 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 XP 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

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