

OPUS

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S I E   D A T A   C L O U D

## Tasks & Lead Management

There are thousands of ways to drop the ball. Not dropping the ball and keeping your commitments with your customers is one of the most important keys to success. Opus makes keeping your commitments easy. By using tasks effectively, you'll also know where you can improve.



[Click here to view a training video on Opus Tasks.](#)

### **Training Assignment: Tracking New Customers via Opus Tasks**

In this training, you will login and create your own test tasks.

#### **Step 1. Log in and create new parent / student account.**

Log into Opus ([www.opus.schooliseasy.com/login](http://www.opus.schooliseasy.com/login)) and create a new test parent / student in the Quick Add home widget.

Home Calendar People Approve My Session Logs My Timesheets Media Work Orders Reports Admin

account search

### Quick Parent/Student

<b>Parent</b>	<b>Student</b>
First James	First Mia
Last Warden	Last Warden
Email jwarden@gmail.com	Email
Phone 888.888.8888	Phone
<a href="#">Add Client Tags</a>	<a href="#">Add Student Tags</a>

Prospect

Parent Admin Note 7th grade son. Needs help with math.

Save

### Tasks Assigned

## Step 2. Create a new task for the student.

After Saving the New Parent / Student, you will see both the newly created accounts with a few options.

Quick Parent/Student



Added

Warden, James Client Task Commlog  
Warden, Mia Student Task Commlog Work Order

Parent

Student

First   
Last   
Email   
Phone

First   
Last   
Email   
Phone

Add Client Tags

Add Student Tags

Prospect

Parent Admin Note

Save

### Step 3. Enter the Task fields.

In this example, we received an email inquiry at 3:30 with a request to call the parent after 5pm to discuss his daughter needs. I'm the administrator and I'm assigning the task to myself. (I also created a reminder on my phone given that this task is for later today. Apple Sirri / Google Assistant).

Add Task

[Save](#) [Cancel](#)

[Topic](#)  
manage 1) Call Prospect / Create Work Ord ▼

[Timezone](#) US/Pacific ▼

[Task Priority](#) ▼

[Project:](#)  
manage ▼

[To](#) Jared Wells ▼ 

[Student](#) Mia Warden ▼

[Description](#)  
Interested in math tutoring 7th grade.

[Active Date](#) 01/08/19 03:38 PM ✕

[Due Date](#) 1/8/19 05:00 PM ✕

[Save](#) [Cancel](#)

## Step 4. Complete the Task

I spoke to the parent and complete a Work Order, so I complete the task by adding a "Completed Note" and by clicking Save and New to create a new Match w/ Tutor task.. (NOTE: in the screenshot below - the active date/time and due date/time are listed as the same date/time as the completed date/time. Showing these fields are a new feature and are not displaying correctly. This will be fixed so that they show the correct active and due date/time.)

The screenshot shows a task completion form with the following fields and buttons:

- Buttons:** Save, Save And New, Cancel (top and bottom).
- Completed:** A blue square indicator.
- Complete Note:** A text area containing "Spoke with James. Good conversation. Created work order."
- Completed Date:** 01/08/19, 4:14 PM (with a close button).
- Student:** Mia Warden
- Topic:** 1) Call Prospect / Create Work Order
- Active Date:** 01/08/19, 4:14 PM
- Due Date:** 01/08/19, 4:14 PM
- Description:** Interested in math tutoring. 7th grade.

A yellow circle highlights the "Save And New" button at the bottom of the form.

## Step 5. Create new task with next step.

In this example, I assign the Match w/ Tutor task to my admin assistant Zach Cameron with a new active and due date. Both Zach and I will receive a notice if it is not completed by the due date.

### Add Task

Save Save And New Cancel

**Topic** 2) Match w/ Tutor manage

**Task Priority**

**Project:**  manage

**To** Zach Cameron - (Center Admin)

**Student** Mia Warden

**Description** See work order.

**Active Date** 01/08/19 4:17 PM

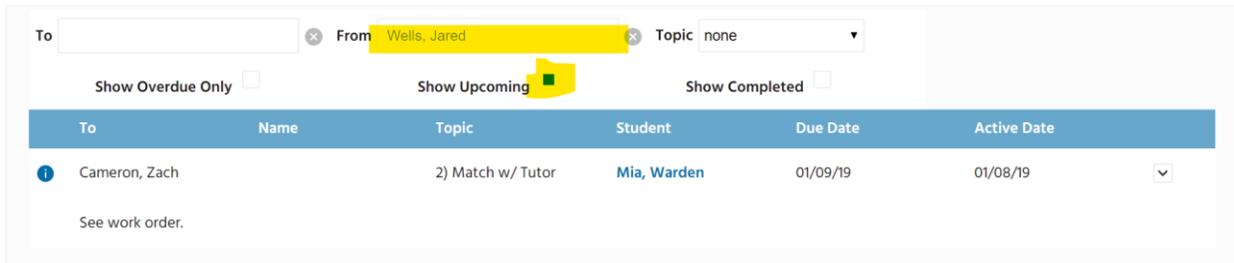
**Due Date** 1/9/19 10:00 AM

Save Save And New Cancel

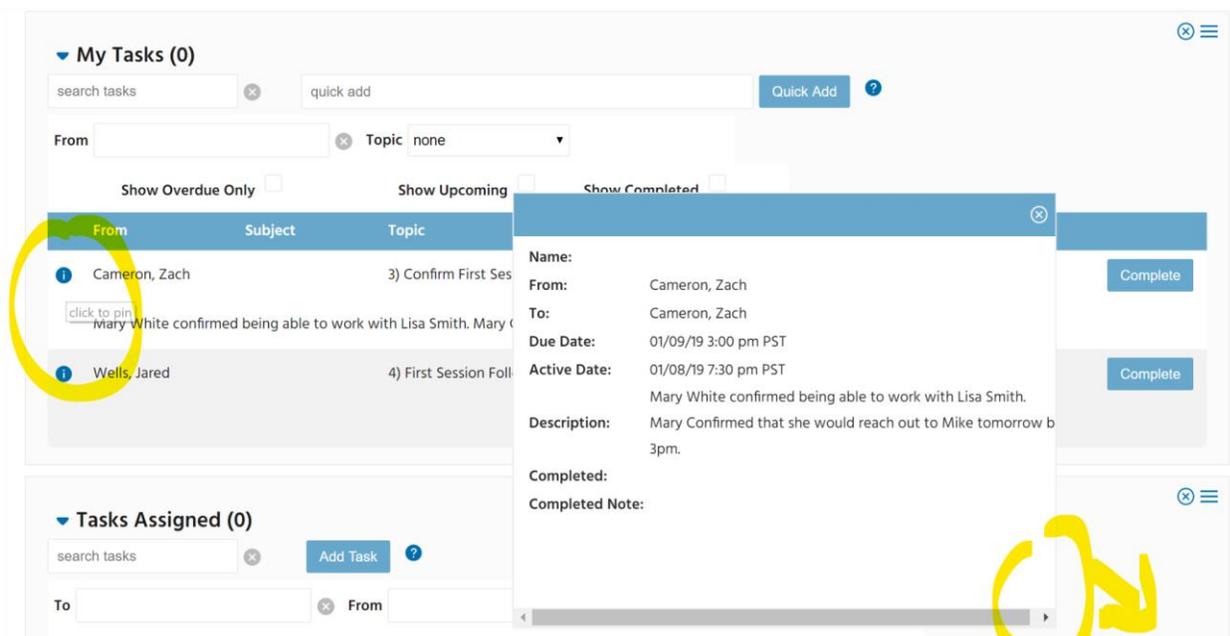
## Step 5. Monitor active and upcoming tasks.

In the Tasks Assigned home tab widget, I can view tasks I have assigned. And, if I clear the "From" filter,

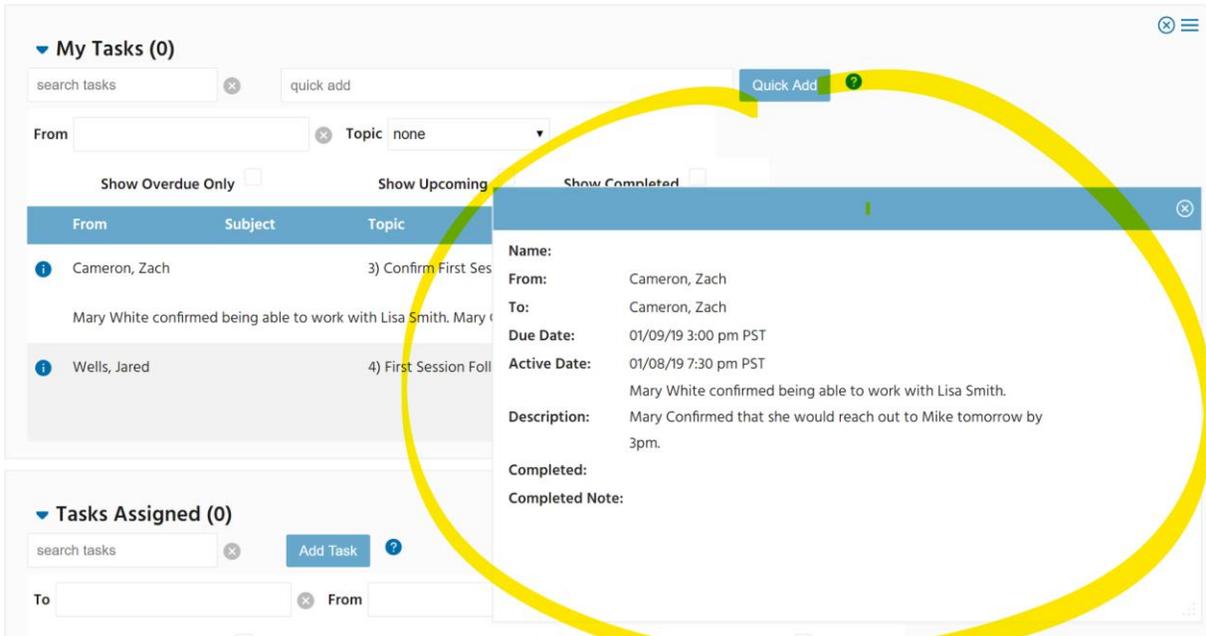
highlighted below, I can see all tasks assigned by anyone. This is a great way for me to make sure that everyone in my organization is on top of their tasks. I can also use the filters to show specific topics, show upcoming, overdue, and completed tasks.



Zach reviews his own Tasks in the screenshot below by rolling over the information “i” icon on the left of the screen. See screenshot below. Problem is that some of the text is cut off in the widow showing the task Description. Zach clicks on the “i” which pins the window so that it does not disappear when he moves his mouse off the “i” icon. Zach then moves his mouse to the lower right corner of the task window and drags it down and to the right for a larger view.



Now Zach can see all the information about the task.



## Step 6. Update a task and edit due date.

The student has been assigned to an instructor and the instructor has been notified that they need to schedule the first session with the father and confirm back with the administrator. Zach created the task to confirm that the first session was scheduled and assigned it to himself. While Zach could have assigned the task to the instructor, he instead chose to assign it to himself, giving one less thing for the instructor has to be trained to do in the system.

Mary, the assigned instructor, emails Zach to let him know that the parent had to leave town for the week and would not be able to schedule the first session until after the 13th. Zach edits and updates the tasks.

See the screenshot below. To edit the task, he goes to the Tasks Assigned widget and clicks on the triangle to the right to edit the relevant task.

The screenshot displays two task management widgets. The top widget, 'My Tasks (2)', has a search bar, a 'quick add' button, and filters for 'From' and 'Topic'. It includes checkboxes for 'Show Overdue Only', 'Show Upcoming', and 'Show Completed'. Below is a table with columns: From, Subject, Topic, Student, Due Date, Active Date, and a 'Complete' button. The bottom widget, 'Tasks Assigned (2)', has a search bar, an 'Add Task' button, and filters for 'To', 'From', and 'Topic'. It includes checkboxes for 'Show Overdue Only', 'Show Upcoming', and 'Show Completed'. Below is a table with columns: To, Name, Topic, Student, Due Date, Active Date, and a dropdown menu. A yellow arrow points from the 'Complete' button in the 'My Tasks' widget to the 'Edit' button in the 'Tasks Assigned' widget.

From	Subject	Topic	Student	Due Date	Active Date	Complete
Cameron, Zach		3) Confirm First Session Scheduled	Mia, Warden	01/09/19	01/08/19	Complete
Mary White confirmed being able to work with Lisa Smith. Mary Confirmed that she would reach out to Mike tomorrow by 3pm.						
Wells, Jared		4) First Session Follow Up	Lisa, Smith	01/15/19	01/08/19	Complete

To	Name	Topic	Student	Due Date	Active Date	Dropdown
Cameron, Zach		4) First Session Follow Up	Lisa, Smith	01/15/19	01/08/19	▼
Cameron, Zach		3) Confirm First Session Scheduled	Mia, Warden	01/09/19	01/08/19	▼
Mary White confirmed being able to work with Lisa Smith. Mary Confirmed that she would reach out to Mike tomorrow by 3pm.						

Edit  
Delete

Here Zach update the notes by appending an "UPDATE" to the bottom of the existing note. He then creates a new due date to make sure he is notified if the instructor does not confirm that the first session was scheduled. When the instructor does confirm that the first session was scheduled, Zach completes the tasks and creates a new task to follow up after three weeks.

[Back To Tasks](#)

### Edit Task

[Save](#) [Cancel](#)

[Topic](#) manage 4) First Session Follow Up ▼

[Task Priority](#) ▼

[Project:](#) manage ▼

[To](#) Zach Cameron ▼ 

[Student](#) Mia Warden ▼

[Description](#)

Mary White confirmed being able to work with Lisa Smith. Mary Confirmed that she would reach out to Mike tomorrow by 3pm.

UPDATE: Mary spoke to father Mike. Said that he had to leave town and would not be able to schedule the first session until the 13th. Mary confirmed that she would follow up.

[Active Date](#) 01/08/19 7:30 PM 

[Due Date](#) 1/14/19 10:00 AM 

[Save](#) [Cancel](#)

**That provides an overview of Opus Tasks. It's easy once you have done it a couple times. Create, Monitor, Edit / Update, Complete. Pretty simple, and more importantly, a powerful way to make sure that you are providing excellent service for all of your wonderful families.**