e123 Resource Guide

ToDos - Using e123 for Everyday Workflow and Tracking

Version: e123_Documentation_ToDos_v1_20230615

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Overview

The e123 system offers organizations the ability to input reminders, known as ToDos, on their platform to track their everyday workflow. Users will be able to see their upcoming responsibilities to Members and Agents without having to leave their back office.

Objective

The objective of this guide is to provide you with an overview of what to expect when setting up ToDos into your organization's platform.

The following instructions will show you how to:

- Provide ToDo access to Users
- Set up a ToDo workflow that provides your organization with personalized views
- Assign ToDos
- Complete ToDos
- Download ToDos

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What is a ToDo in the e123 system?

Put simply, a ToDo in the E123 system is just like a normal task that needs to be completed.

ToDos are related to and connected to an action/reminder on a Member's or Agent's account.

A User can set up ToDos for their own action items, such as a reminder to pull a report or send a file on the Agent ID that houses their username.

ToDos can be tracked and pulled through its own reporting.

Why would someone set up a ToDo in the e123 system?

Here are some reasons why setting up ToDos in the system could help your organization's flow.

- A ToDo in the E123 system will help remind a User of actions they need to complete for a member or agent without having to write it down, such as using sticky notes, where they can get lost.
- A User will not need outside software reminders or calendars where the task can potentially go unseen or forgotten.
- A ToDo is stored in the system and will remain there, no matter how long it's been. It is archived.
- A client can pull reports to track their work flow, how many actions are requiring extra attention, and what type of work flow they'd like to follow.
- Setting up a ToDo should minimize Client's complaints against follow-ups.
- Users can work through each one so their day is more productive.
- Once completed, Users can mark the ToDo as such so it is no longer an action item.

What types of ToDos can be set up in the e123 system?

A ToDo can be set up on a Member's or an Agent's profile. A Member's account may have ToDos to call them about payments, while an Agent's account may have ToDos to call about expired licenses.

Types:

The Type of ToDos available are determined by your organization's needs.

Example:

- Upgrade/Downgrade
- Email Welcome Letter/Brochure
- Follow up about billing
- Welcome call

Actions:

There are multiple Actions to complete the ToDo that are standard but also customizable.

Example:

- Call
- Email
- Fax
- Follow-up
- Mail
- Meet
- Message
- Payment
- Reminder

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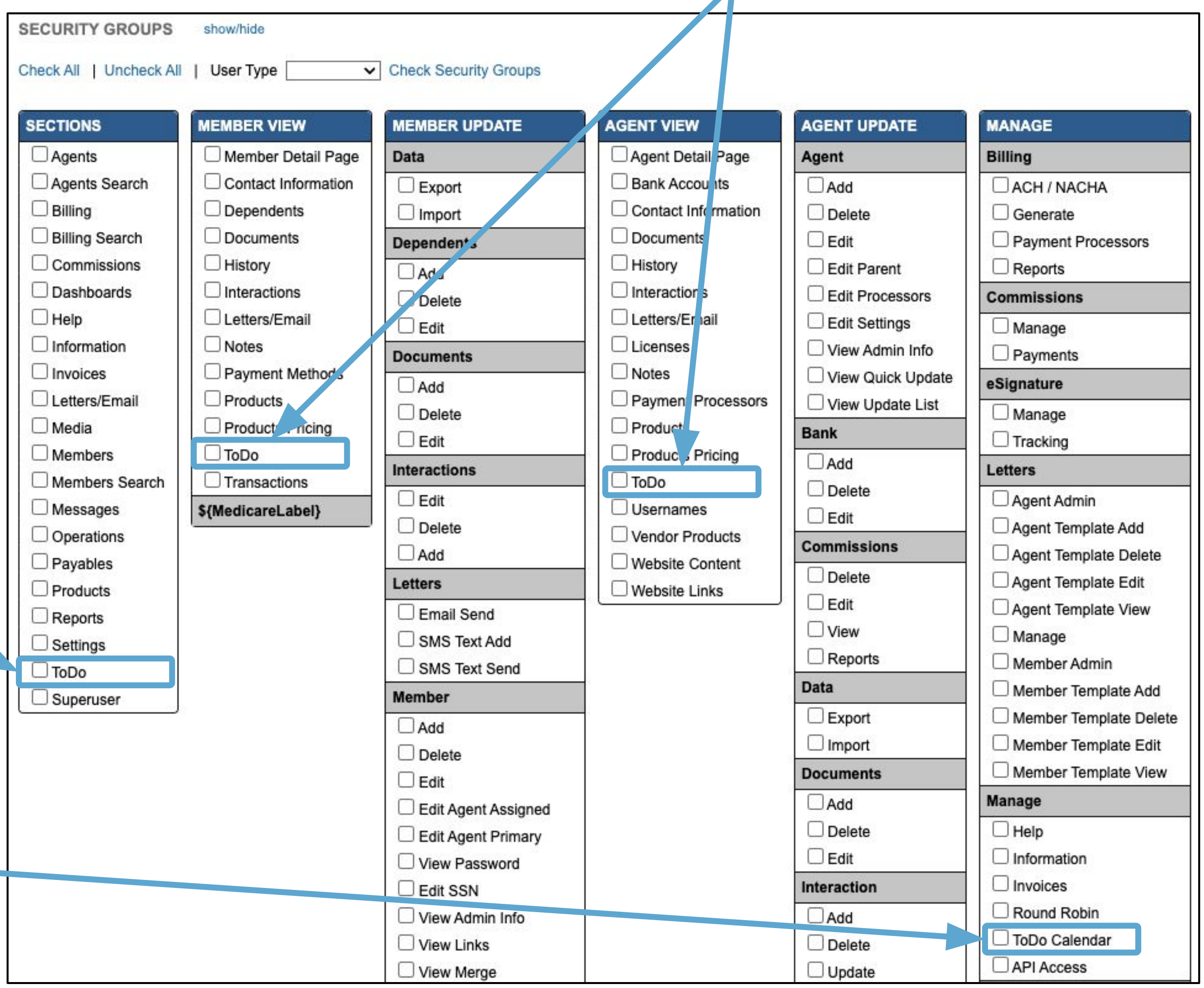
How does someone get access to seeing and creating ToDos?

A User must have ToDos chosen in their security settings in order to have access to see and use the functionality. Note, ToDos must be labeled and assigned to at least one User when created; the ToDo will then show in the assigned User's queue.

1 Decide the User's viewing capabilities.

Choose if the User sees just Member ToDos, just Agent ToDos, or both.

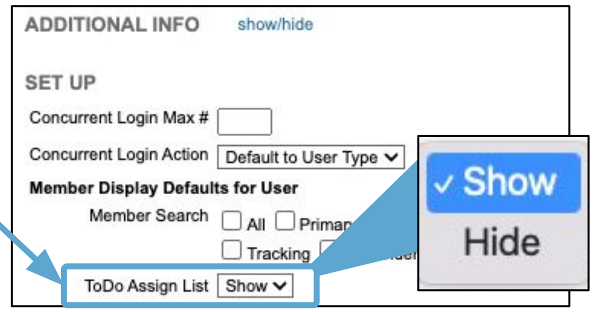
To view ToDos, a User must have 'ToDo' checked in the Sections for the Navigation Bar.



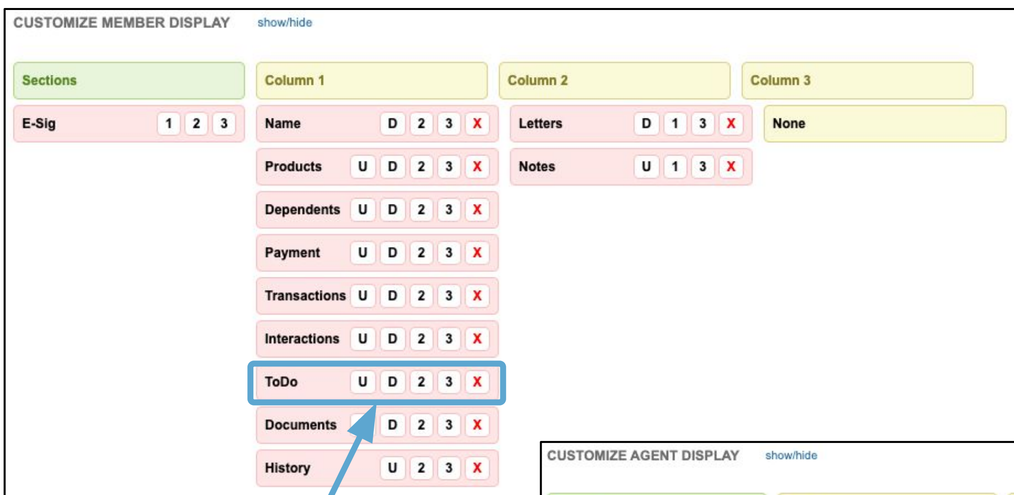
Decide who in the organization has the ability to manage the ToDo Calendar.

Access to Assign to ToDos and Arrangement on a Profile

2 Choose if a User will have the ability to assign ToDos to other Users.



Member Display



Agent Display

3 Move the ToDo section up or down and to the desired column on a Member or Agent profile.

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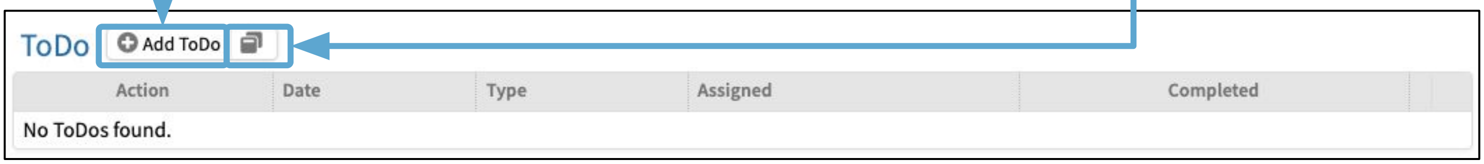
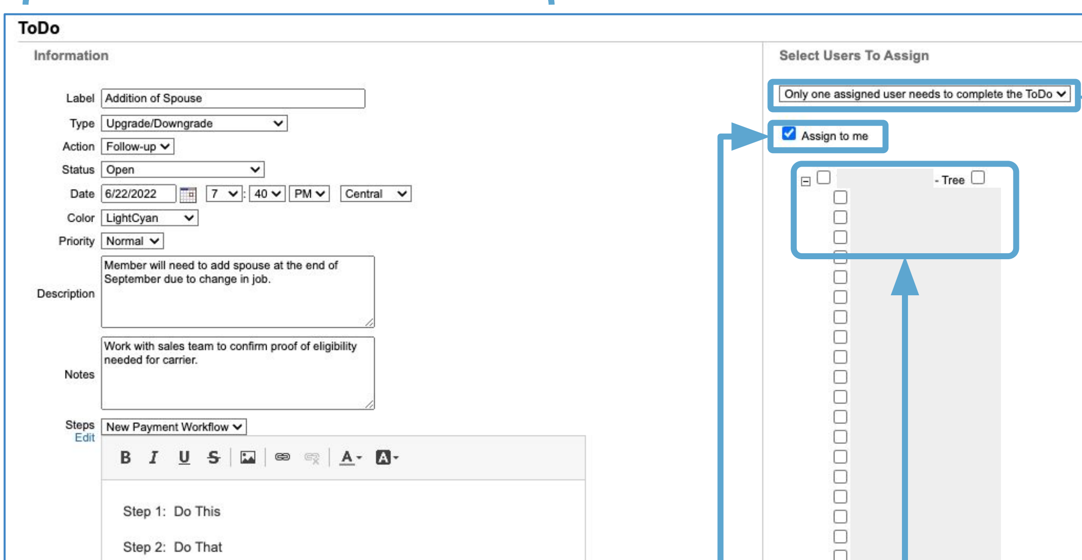
How to Set up a ToDo

1 Click on the “Add ToDo” button on the member or agent account.

Note: Clicking on the window tab brings up a separate pop-up window.



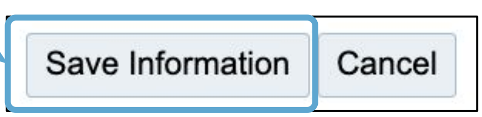
2 Set up the ToDo with the your personal steps required to complete the action. *(See next page for 2.a - An Explanation of the Options and 2.b - Steps.)*



3 Decide if only one User needs to complete the task or if multiple Users should.

4 Assign the ToDo to the person/people that should complete it.

5 Click “Save Information.”



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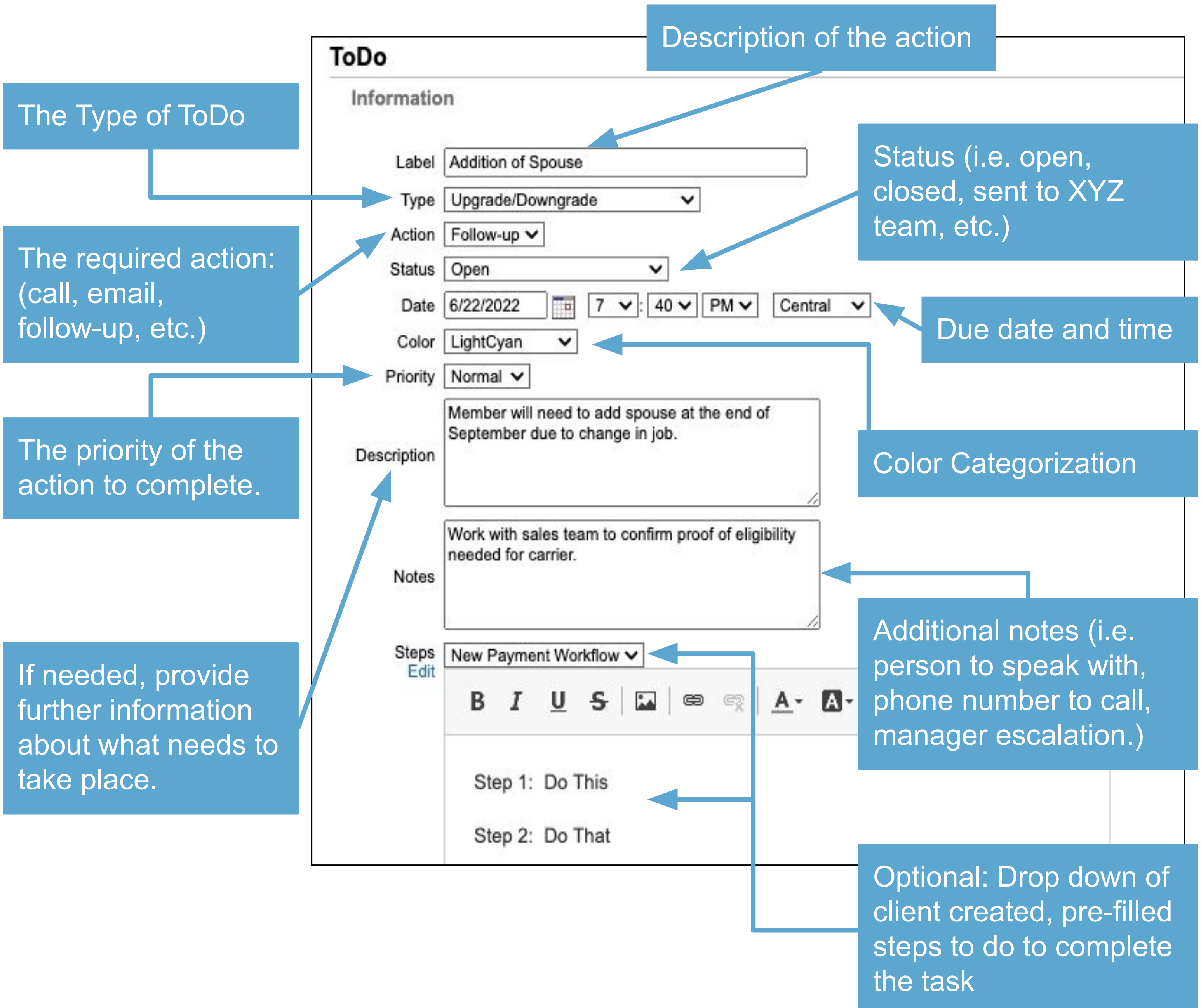
A Closer Look at the Options and Flags to Complete a Task

2.a An Explanation of the Options:



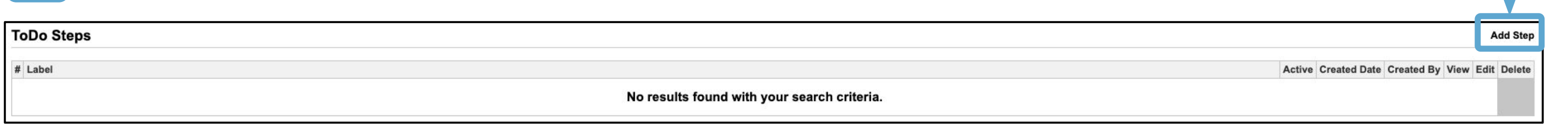
A Closer Look at the Steps Options

2.b Steps Options

Steps are pre-defined notes or sequences that are created by your organization to advise Users how to proceed with an action.

1 Click “Edit” under the Steps option in a ToDo.

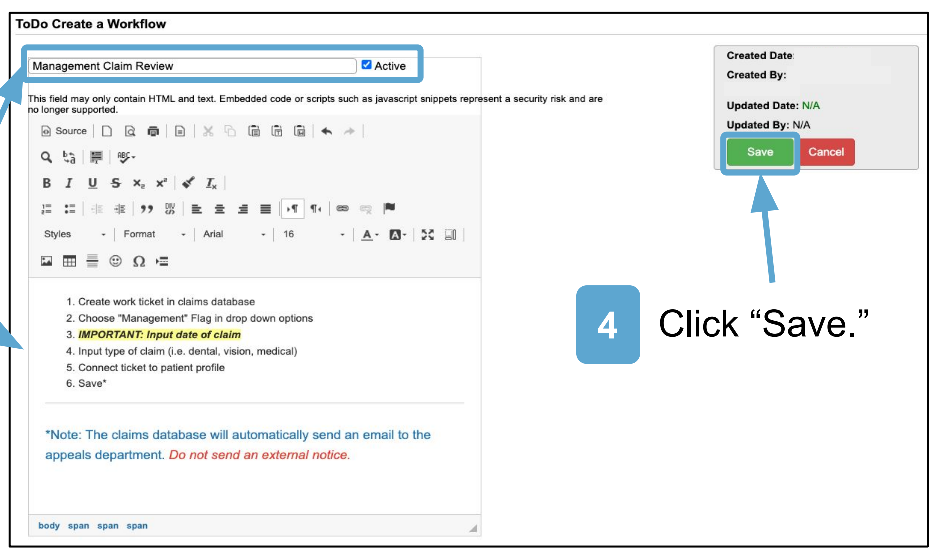
2 Click “Add Step” in the top right corner.



3 Label the Step, and check if it should be active.

Input the Workflow the User(s) should take to complete the task/ToDo.

4 Click “Save.”

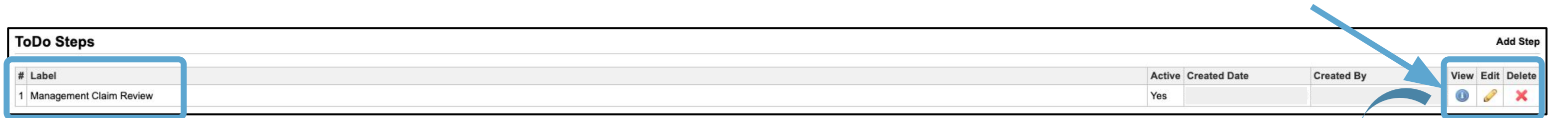


A Closer Look at the Steps Options - continued

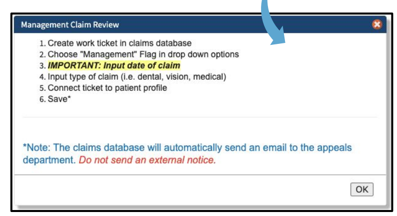
2.b Steps Options - continued

5 The Step(s) your organization creates will be viewable in a list so that they can be viewed, edited, or deleted as needed.

“View” - “Edit” - “Delete”



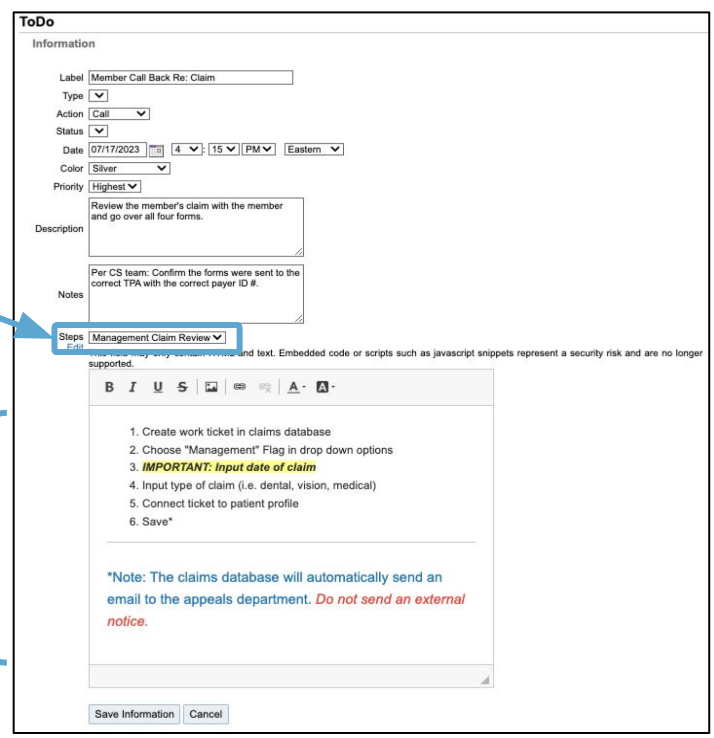
<u>Tip:</u> If your organization needs to set up different workflows for Members and Agents, label the Step(s) with appropriate identifiers.



6

Once a Step is created, a User can select the appropriate one to use (if applicable) for their workflow when setting up a ToDo.

When the Step is chosen, the predefined data will auto populate.

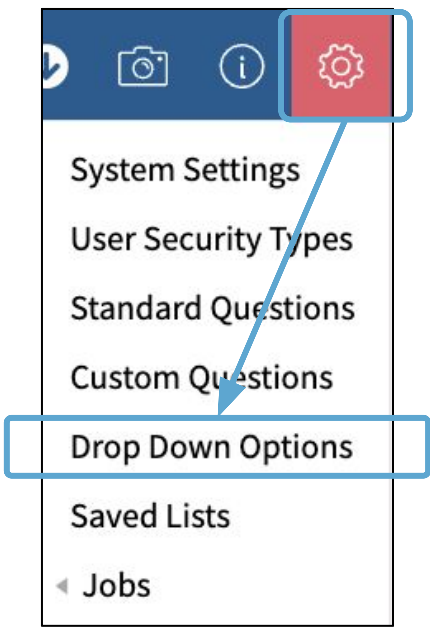


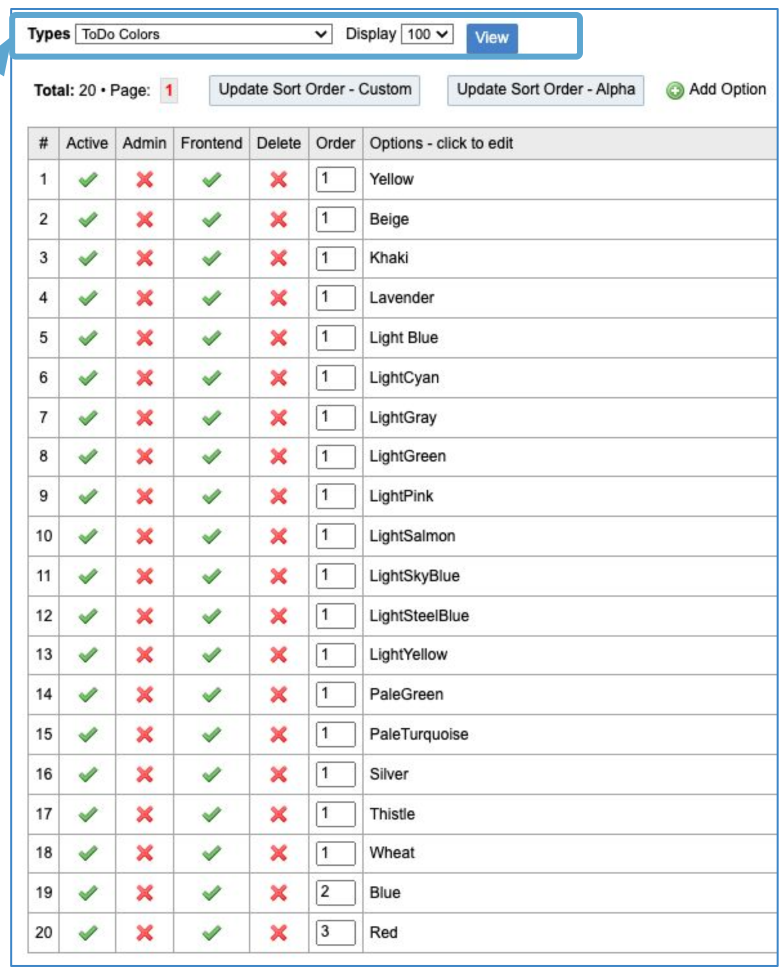
Color Categorization

A question often asked is, “Do the colors that are listed mean anything?”

Answer: The colors are meant for the client to use them how they see fit in their process flows. An example would be labeling all ToDos related to money with the color green.

The colors do not mean anything to e123, and are not connected to an e123 action. In fact, a client can rename the colors in the ‘Settings > Drop Down Options’ menu or get rid of them entirely if they don’t want them there.





#	Active	Admin	Frontend	Delete	Order	Options - click to edit
1	✔	✘	✔	✘	1	Yellow
2	✔	✘	✔	✘	1	Beige
3	✔	✘	✔	✘	1	Khaki
4	✔	✘	✔	✘	1	Lavender
5	✔	✘	✔	✘	1	Light Blue
6	✔	✘	✔	✘	1	LightCyan
7	✔	✘	✔	✘	1	LightGray
8	✔	✘	✔	✘	1	LightGreen
9	✔	✘	✔	✘	1	LightPink
10	✔	✘	✔	✘	1	LightSalmon
11	✔	✘	✔	✘	1	LightSkyBlue
12	✔	✘	✔	✘	1	LightSteelBlue
13	✔	✘	✔	✘	1	LightYellow
14	✔	✘	✔	✘	1	PaleGreen
15	✔	✘	✔	✘	1	PaleTurquoise
16	✔	✘	✔	✘	1	Silver
17	✔	✘	✔	✘	1	Thistle
18	✔	✘	✔	✘	1	Wheat
19	✔	✘	✔	✘	2	Blue
20	✔	✘	✔	✘	3	Red

Note: The drop down is also where your organization can change and customize the ToDo Types, etc.

What does a ToDo look like once it's saved?

There are multiple ways to view the ToDos in the system.

1 Member/Agent profile view

2 List view


ToDo List

All Users - Change User - View All

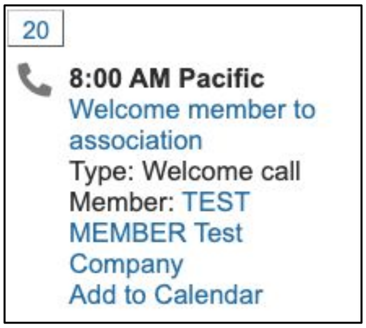
Total: 5 • Page: 1

Scheduled Date

Export List

#	Created		Scheduled		Completed	Days	Label	Type	Status	Action	Info	Assigned	ID/Member	ID/Agent-Group	Mark Complete	Calendar	Edit	Delete	Batch
1	Wednesday	6/15/2022 1:04 PM	Tuesday	6/28/2022 10:08 AM		13	Call to confirm member see's payment	Follow up about billing	Member Request Call Back	Follow-up	View	User:							
2	Wednesday	6/15/2022 1:03 PM	Friday	6/24/2022 12:27 PM		9	Take make-up payment per member	Follow up about billing	Open	Payment	View	User:							

3 Calendar view



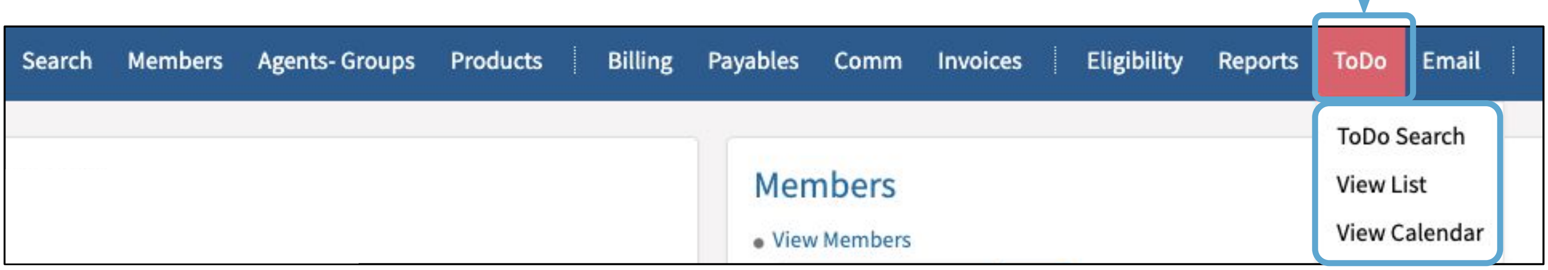
Note: *If a User does not see a ToDo they were assigned, make sure that they have the right security settings.*

The Navigation Bar: Viewing of ToDos

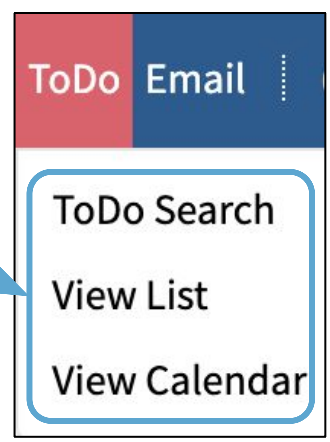
One of the main questions we receive is, “Where do you find ToDos in the system when you’re not on a direct Member or Agent’s profile?”

Answer: This is where your organization and Users will want to utilize the Navigation Bar at the top of their back office page.

1 Click on the “ToDo” button at the top of the Navigation Bar.



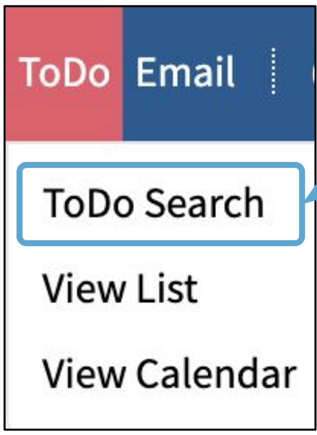
2 Then, choose how you would like to view the ToDos: through a search, in a list, or via a calendar.



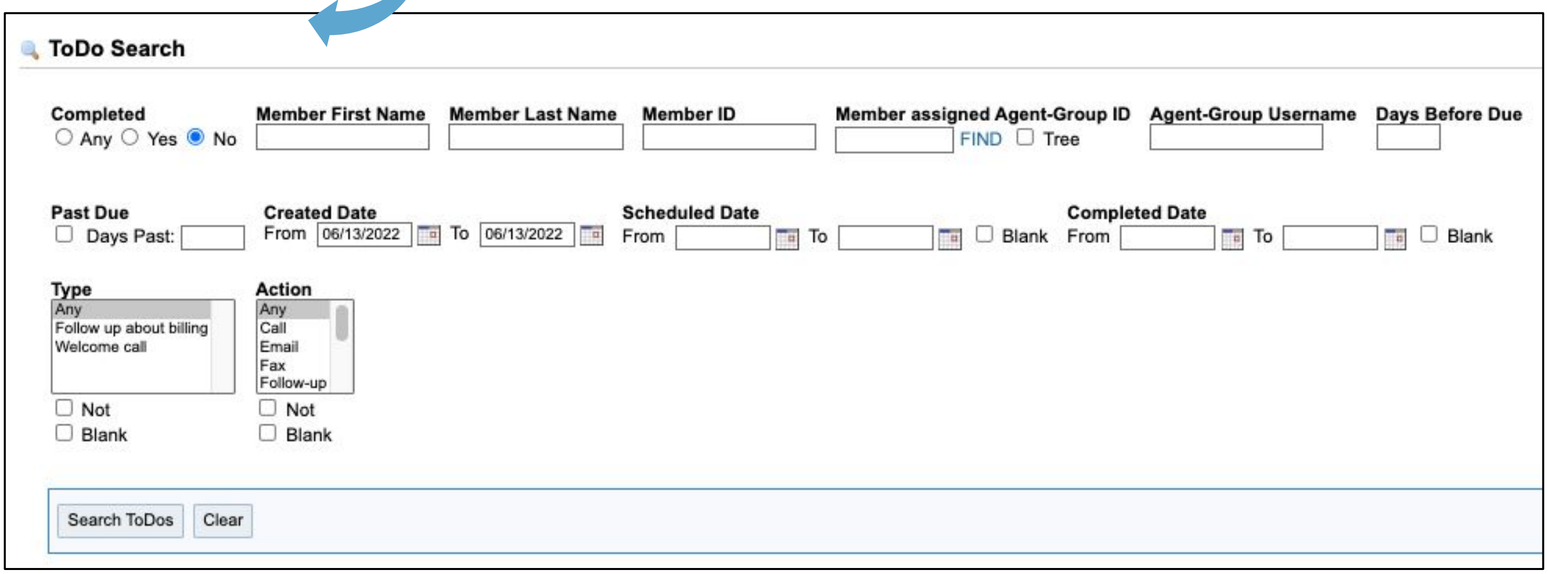
On the following pages, we will walk through what each of these options offers.

The Navigation Bar: Viewing of ToDos: ToDo > Search

The ToDo Search allows a User to find what they are looking for with filters such as completion, assignment, dates, type, and action.



A User can choose as little or as many options as needed.



Hint: If you are unable to find a ToDo you are looking for, if you have a lot of filters chosen, try broadening your search instead of narrowing it. You may have inadvertently refined your search too much.

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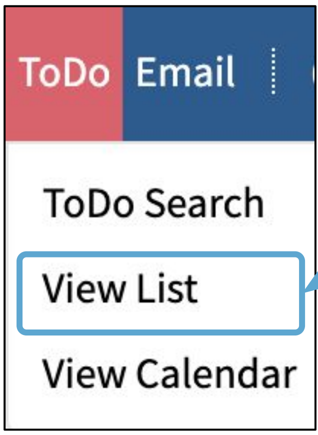
The Navigation Bar: Viewing of ToDos: ToDo > View List

The ToDo tab will allow you to view a list of the tasks that are scheduled to be completed.



By default, the list will show the newest ToDos on top. The headers for ToDos are clickable and can help you view the list with the information you want at the top.

You can choose the length of time that you want to view the ToDos. If needed, you're able to view them for the past week as well.

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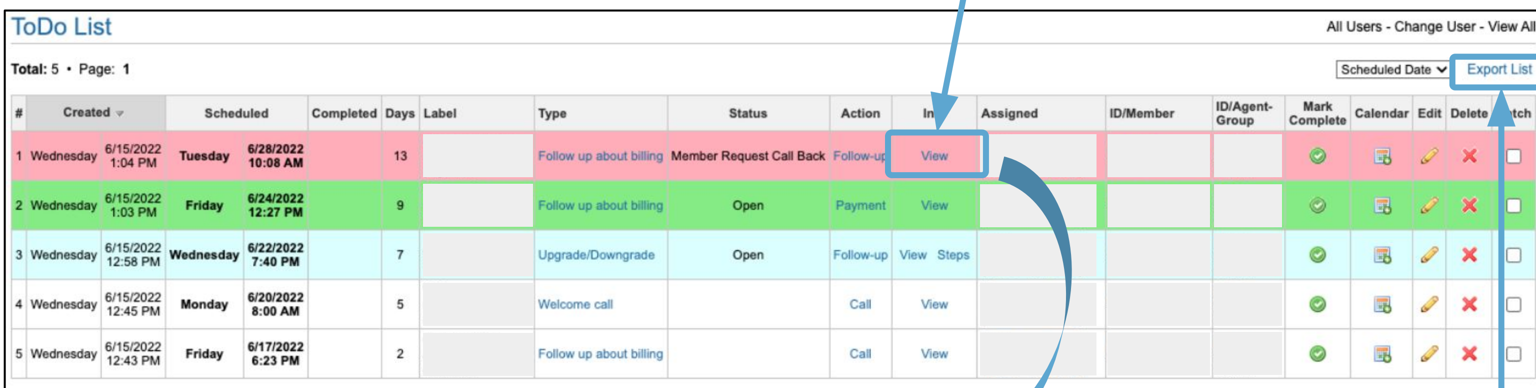
The Navigation Bar: Viewing of ToDos: ToDo > View List - Viewing and Accessing ToDos from the List

1 Click on “View” to see the ToDo details.



ToDo List

All Users - Change User - View All

Total: 5 • Page: 1

Scheduled Date

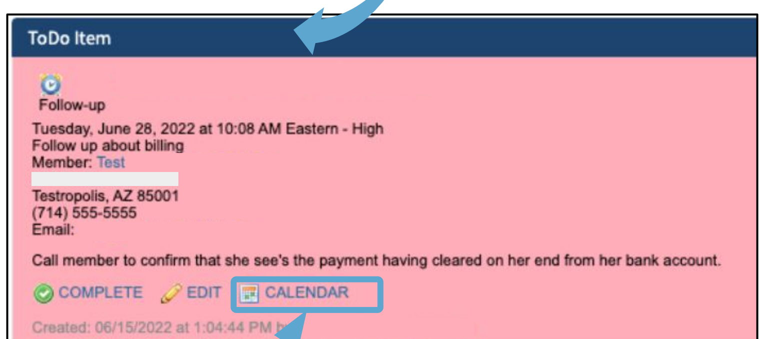
Export List

#	Created		Scheduled		Completed	Days	Label	Type	Status	Action	In	Assigned	ID/Member	ID/Agent-Group	Mark Complete	Calendar	Edit	Delete	tch
1	Wednesday	6/15/2022 1:04 PM	Tuesday	6/28/2022 10:08 AM		13		Follow up about billing	Member Request Call Back	Follow-up	View								
2	Wednesday	6/15/2022 1:03 PM	Friday	6/24/2022 12:27 PM		9		Follow up about billing	Open	Payment	View								
3	Wednesday	6/15/2022 12:58 PM	Wednesday	6/22/2022 7:40 PM		7		Upgrade/Downgrade	Open	Follow-up	View Steps								
4	Wednesday	6/15/2022 12:45 PM	Monday	6/20/2022 8:00 AM		5		Welcome call		Call	View								
5	Wednesday	6/15/2022 12:43 PM	Friday	6/17/2022 6:23 PM		2		Follow up about billing		Call	View								

2

You’ll be able to:

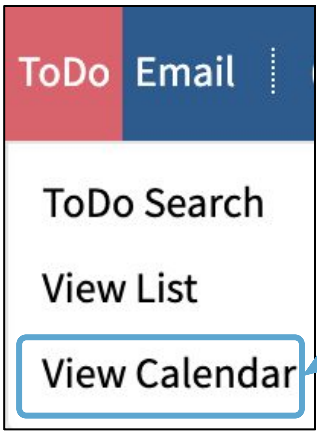
- View contact information
- See additional notes
- Complete the ToDo
- Edit information



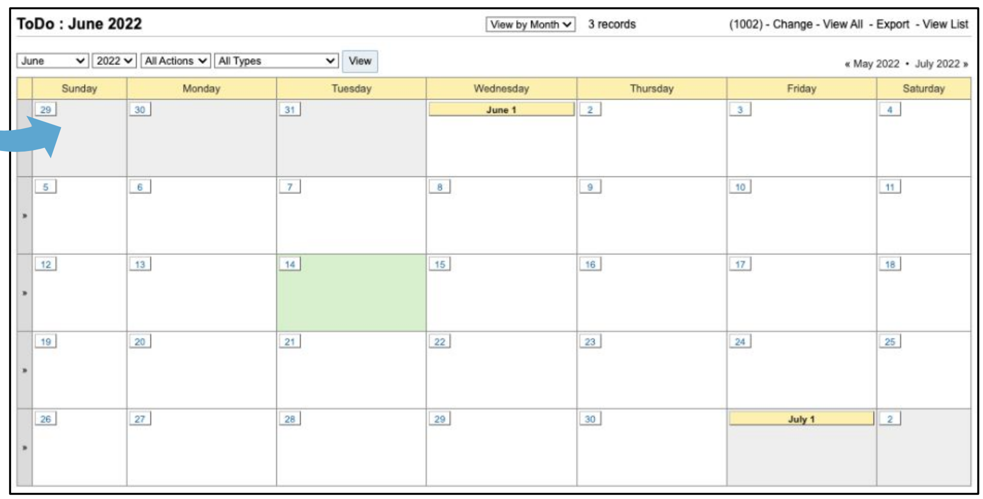
<u>Helpful features:</u>
A user can download a file that they can then import into an outside calendar such as Outlook.

The Navigation Bar: Viewing of ToDos: ToDo > View Calendar

This option will show you a calendar with any events you have added to the ToDo calendar.



A) Calendar without ToDos

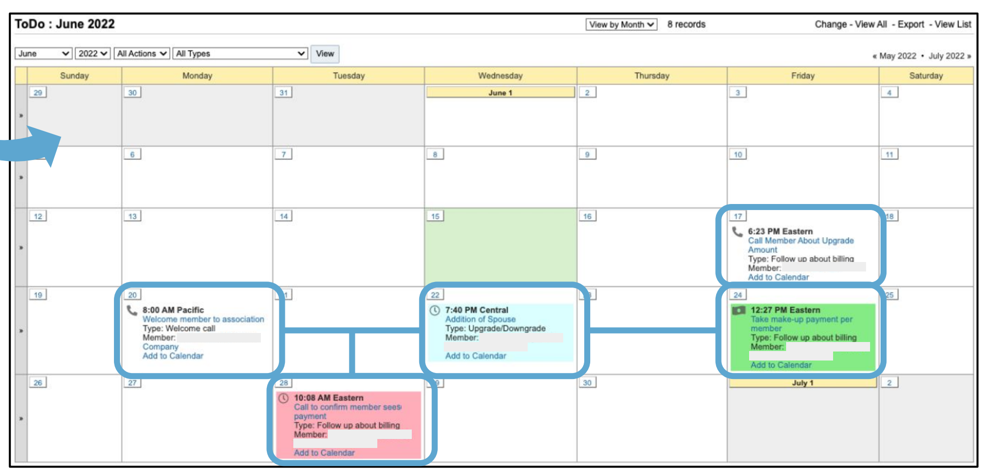


Example views:

A) The first calendar shows what it will look like when there are no ToDos set up for a User for the chosen month.

B) The second view shows what a User can expect to see once there are ToDos assigned.

B) Calendar with ToDos



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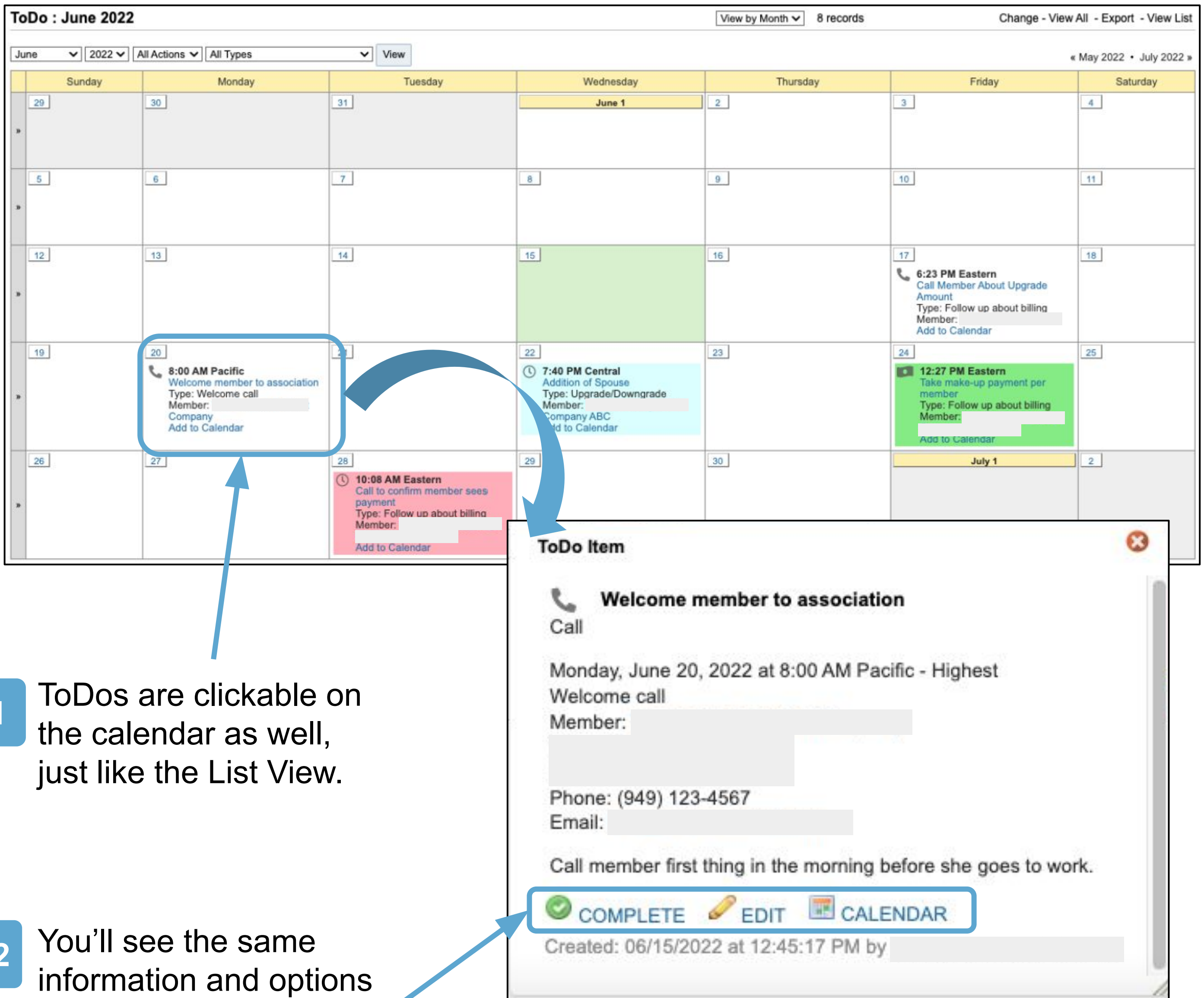
The Navigation Bar: Viewing of ToDos: ToDo > View Calendar - Viewing and Accessing ToDos from the Calendar



1 ToDos are clickable on the calendar as well, just like the List View.

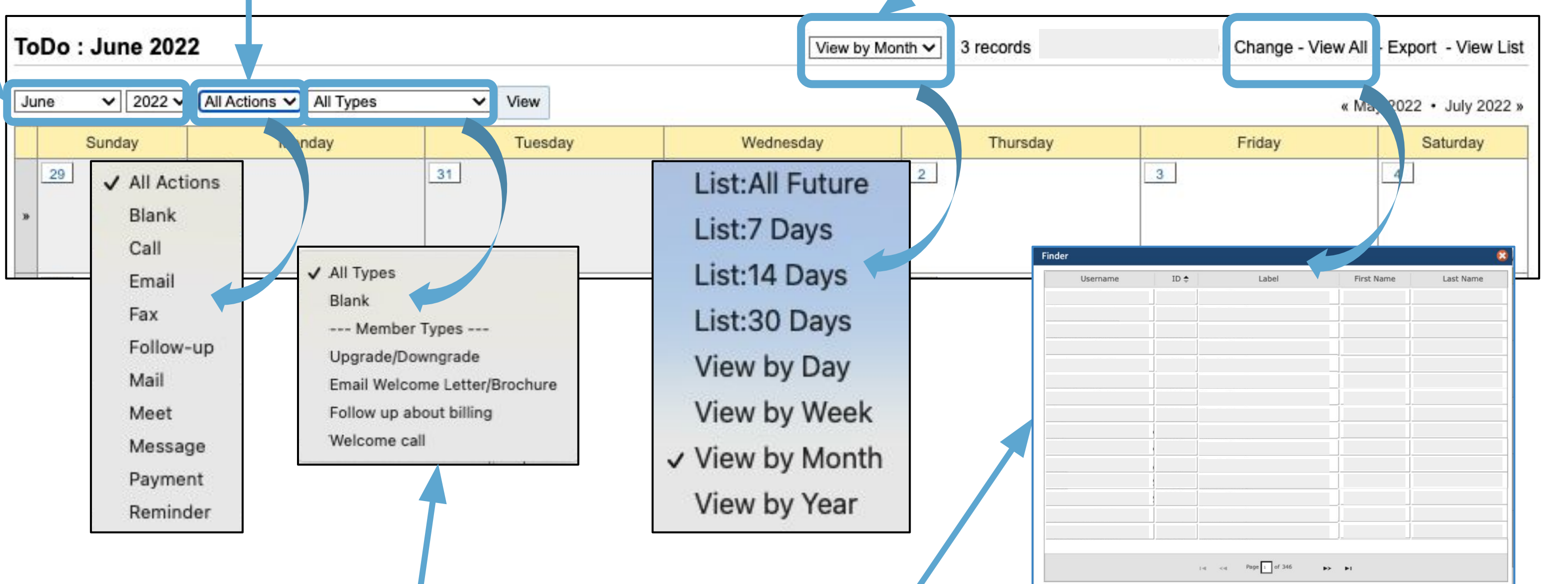
2 You'll see the same information and options as you would clicking "View" from the List.

The Navigation Bar: Viewing of ToDos: ToDo > View Calendar - Filtering ToDos from the Calendar

1 Choose the desired time period. *Default= Current month & year*

2 If needed, you can select the Action that is required.

4 Choose what time period you are wanting to see.



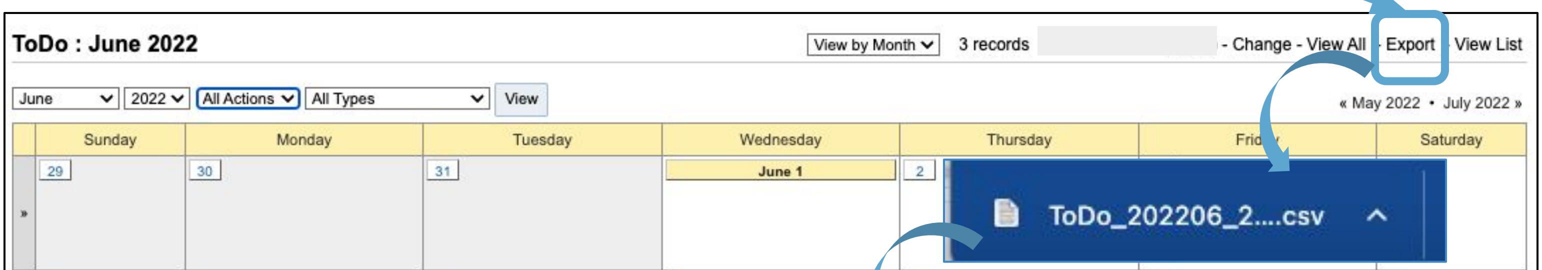
3 Select the Type of ToDo you are looking for.

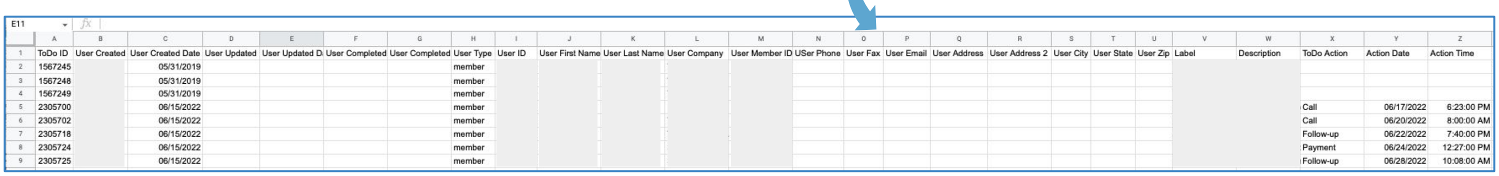
5 **To choose which person's ToDos you see:**
Click "Change" next to the current Username, and scroll down through the list to who you're looking for. Or, click "View All" to see everyone's ToDos at once.

The Navigation Bar: Viewing of ToDos: ToDo > View Calendar - Filtering ToDos from the Calendar - Exporting

The e123 platform allows for Users with the provided security the ability to download ToDos to filter and manage them offline.

1 Click “Export” to download a list of all of the ToDos.





ToDo ID	User Created	User Created Date	User Updated	User Updated D	User Completed	User Completed	User Type	User ID	User First Name	User Last Name	User Company	User Member ID	USer Phone	User Fax	User Email	User Address	User Address 2	User City	User State	User Zip	Label	Description	ToDo Action	Action Date	Action Time
1567245		05/31/2019					member																		
1567248		05/31/2019					member																		
1567249		05/31/2019					member																		
2305700		06/15/2022					member																Call	06/17/2022	6:23:00 PM
2305702		06/15/2022					member																Call	06/20/2022	8:00:00 AM
2305718		06/15/2022					member																Follow-up	06/22/2022	7:40:00 PM
2305724		06/15/2022					member																Payment	06/24/2022	12:27:00 PM
2305725		06/15/2022					member																Follow-up	06/28/2022	10:08:00 AM

2 You can upload this csv file list into an outside calendar if desired or filter it here instead of through the system.

Note: “View List” will take you to the list of ToDos and out of the current Calendar view.

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What does a User do with all these ToDos?

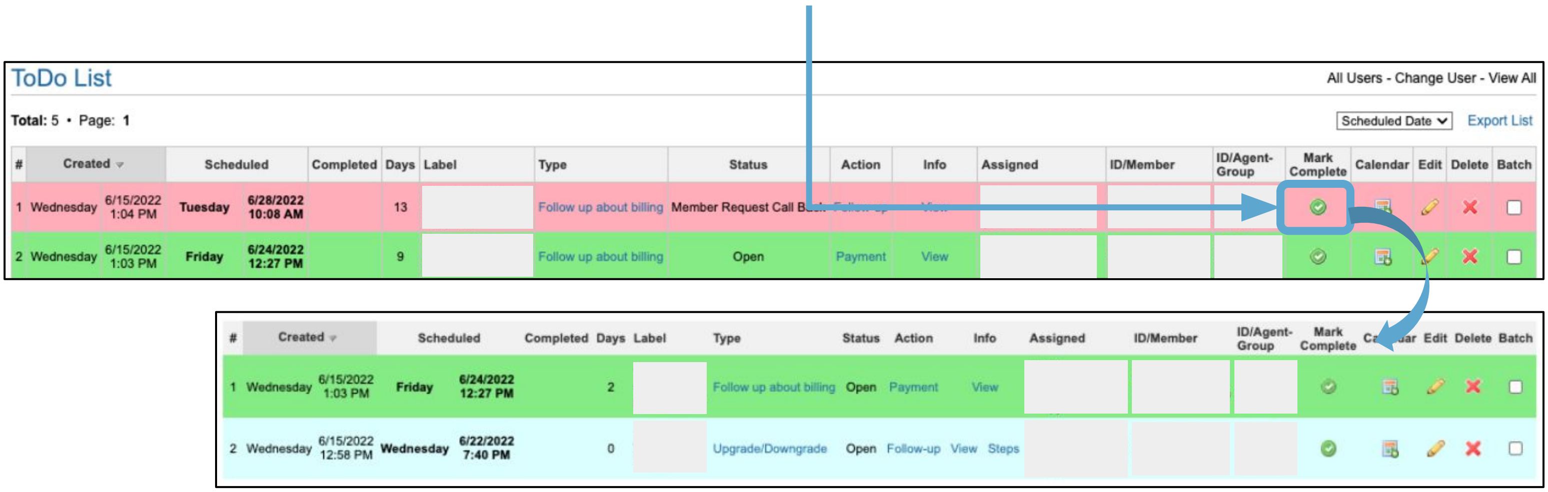
That’s easy, complete them!

Once a User has done the ToDo/task that is associated with the Member or Agent, they will need to click “Complete” for each one so that they- and other Users- will know it is done. Remember, some ToDos may be assigned to multiple Users to complete if that option was chosen.

With the filtering options from earlier, a User can pull reports and see which ToDos are done and which still need to be done. This should help with keeping your organization's workflow process efficient.

How to Complete a ToDo and What it Looks Like Once Saved

A **<u>From the list:</u>** Click the check mark under “Mark Complete” and the ToDo will be removed. The next ToDo will automatically move to the top.



or

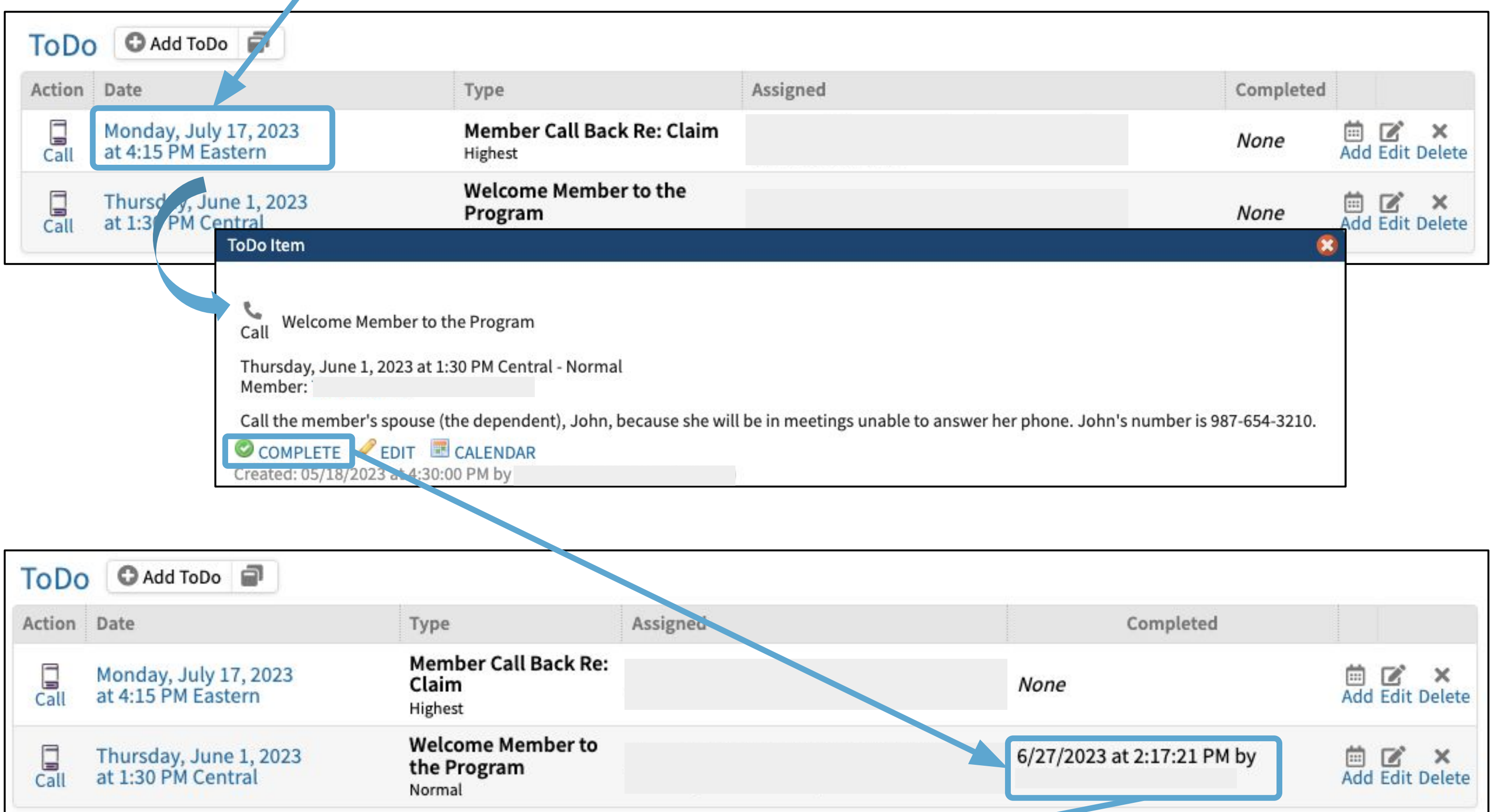
B **<u>On the calendar:</u>** Click “Complete.”

The ToDo will now have a check mark on the task to show it’s completed.

How to complete a ToDo and what it looks like once saved - continued

or

C **<u>From the Member or Agent profile:</u>** Click the date the ToDo is supposed to take place. Click “Complete.”

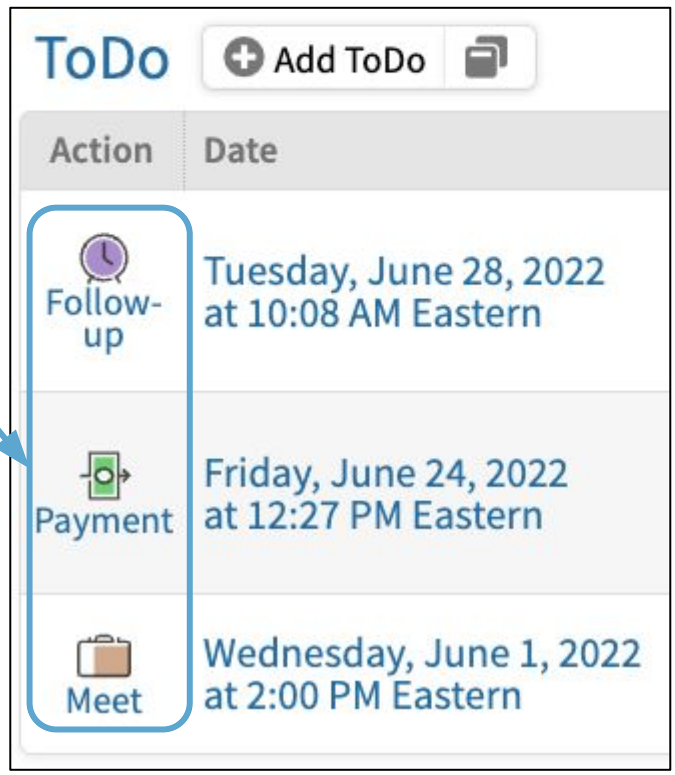


The system will automatically populate to show the ToDo as Completed and who did it. This will show no matter which view the ToDo was completed from.

ToDo Icons

Each action item for the ToDos has its own picture. The picture is a visual way to see what ToDos are needed for a person without having to read labels or descriptions.

Each of the ToDo Actions has its own related picture.



Completed Training

This is the end of the training manual.

If you have any additional questions, or if you would like training documentation for another subject, please reach out to e123 Support Services or your Client Engagement Manager (CEM).

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