

e123 Resource Guide

ToDoS - Using e123 for Everyday Workflow and Tracking

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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

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.

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

A User can set up ToDo's 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.

ToDo's 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 are also customizable.

Example:

Call
Email
Fax
Follow-up
Mail
Meet
Message
Payment
Reminder

How does someone get access to seeing and creating Todos?

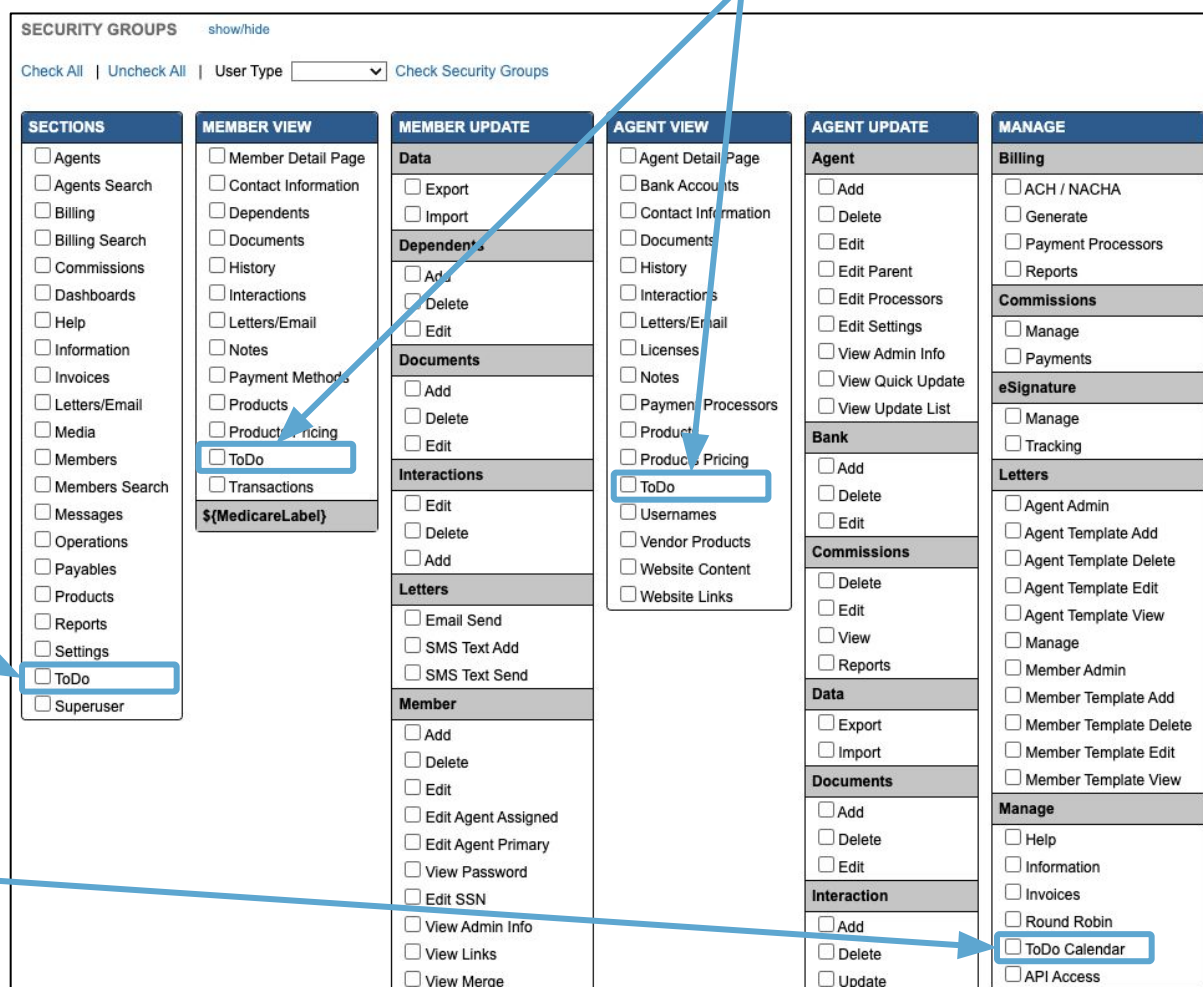
A User must have Todos chosen in their security settings in order to have access to see and use the functionality. Note, Todos must be labeled and assigned to at least one User when created; the Todo will then show in the assigned User's queue.

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.



SECURITY GROUPS show/hide

Check All | Uncheck All | User Type Check Security Groups

SECTIONS	MEMBER VIEW	MEMBER UPDATE	AGENT VIEW	AGENT UPDATE	MANAGE
<input type="checkbox"/> Agents <input type="checkbox"/> Agents Search <input type="checkbox"/> Billing <input type="checkbox"/> Billing Search <input type="checkbox"/> Commissions <input type="checkbox"/> Dashboards <input type="checkbox"/> Help <input type="checkbox"/> Information <input type="checkbox"/> Invoices <input type="checkbox"/> Letters/Email <input type="checkbox"/> Media <input type="checkbox"/> Members <input type="checkbox"/> Members Search <input type="checkbox"/> Messages <input type="checkbox"/> Operations <input type="checkbox"/> Payables <input type="checkbox"/> Products <input type="checkbox"/> Reports <input type="checkbox"/> Settings <input checked="" type="checkbox"/> ToDo <input type="checkbox"/> Superuser	<input type="checkbox"/> Member Detail Page <input type="checkbox"/> Contact Information <input type="checkbox"/> Dependents <input type="checkbox"/> Documents <input type="checkbox"/> History <input type="checkbox"/> Interactions <input type="checkbox"/> Letters/Email <input type="checkbox"/> Notes <input type="checkbox"/> Payment Methods <input type="checkbox"/> Products <input type="checkbox"/> Product Pricing <input checked="" type="checkbox"/> ToDo <input type="checkbox"/> Transactions \${MedicareLabel}	Data <input type="checkbox"/> Export <input type="checkbox"/> Import Dependents <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Documents <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Interactions <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Add Letters <input type="checkbox"/> Email Send <input type="checkbox"/> SMS Text Add <input type="checkbox"/> SMS Text Send Member <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Edit Agent Assigned <input type="checkbox"/> Edit Agent Primary <input type="checkbox"/> View Password <input type="checkbox"/> Edit SSN <input type="checkbox"/> View Admin Info <input type="checkbox"/> View Links <input type="checkbox"/> View Merge	<input type="checkbox"/> Agent Detail Page <input type="checkbox"/> Bank Accounts <input type="checkbox"/> Contact Information <input type="checkbox"/> Documents <input type="checkbox"/> History <input type="checkbox"/> Interactions <input type="checkbox"/> Letters/Email <input type="checkbox"/> Licenses <input type="checkbox"/> Notes <input type="checkbox"/> Payment Processors <input type="checkbox"/> Product <input type="checkbox"/> Product Pricing <input checked="" type="checkbox"/> ToDo <input type="checkbox"/> Usernames <input type="checkbox"/> Vendor Products <input type="checkbox"/> Website Content <input type="checkbox"/> Website Links	Agent <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> Edit Parent <input type="checkbox"/> Edit Processors <input type="checkbox"/> Edit Settings <input type="checkbox"/> View Admin Info <input type="checkbox"/> View Quick Update <input type="checkbox"/> View Update List Bank <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Commissions <input type="checkbox"/> Delete <input type="checkbox"/> Edit <input type="checkbox"/> View <input type="checkbox"/> Reports Data <input type="checkbox"/> Export <input type="checkbox"/> Import Documents <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Edit Interaction <input type="checkbox"/> Add <input type="checkbox"/> Delete <input type="checkbox"/> Update	Billing <input type="checkbox"/> ACH / NACHA <input type="checkbox"/> Generate <input type="checkbox"/> Payment Processors <input type="checkbox"/> Reports Commissions <input type="checkbox"/> Manage <input type="checkbox"/> Payments eSignature <input type="checkbox"/> Manage <input type="checkbox"/> Tracking Letters <input type="checkbox"/> Agent Admin <input type="checkbox"/> Agent Template Add <input type="checkbox"/> Agent Template Delete <input type="checkbox"/> Agent Template Edit <input type="checkbox"/> Agent Template View <input type="checkbox"/> Manage <input type="checkbox"/> Member Admin <input type="checkbox"/> Member Template Add <input type="checkbox"/> Member Template Delete <input type="checkbox"/> Member Template Edit <input type="checkbox"/> Member Template View Manage <input type="checkbox"/> Help <input type="checkbox"/> Information <input type="checkbox"/> Invoices <input type="checkbox"/> Round Robin <input checked="" type="checkbox"/> ToDo Calendar <input type="checkbox"/> API Access

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.

ADDITIONAL INFO [show/hide](#)

SET UP

Concurrent Login Max #

Concurrent Login Action

Member Display Defaults for User

Member Search ☐ All ☐ Primary

☐ Tracking

ToDo Assign List

CUSTOMIZE MEMBER DISPLAY [show/hide](#)

Sections	Column 1	Column 2	Column 3
E-Sig	Name <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>	Letters <input type="text" value="D"/> <input type="text" value="1"/> <input type="text" value="3"/> <input type="text" value="X"/>	None
	Products <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>	Notes <input type="text" value="U"/> <input type="text" value="1"/> <input type="text" value="3"/> <input type="text" value="X"/>	
	Dependents <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Payment <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Transactions <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Interactions <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	ToDo <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Documents <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	History <input type="text" value="U"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		

Member Display

Agent Display

3

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

CUSTOMIZE AGENT DISPLAY [show/hide](#)

Sections	Column 1	Column 2	Column 3
Invoices	Name <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>	Letters <input type="text" value="D"/> <input type="text" value="1"/> <input type="text" value="3"/> <input type="text" value="X"/>	None
	Users <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>	Notes <input type="text" value="U"/> <input type="text" value="1"/> <input type="text" value="3"/> <input type="text" value="X"/>	
	Licenses <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Accounts <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Products <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Vendor <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Processors <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Documents <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	ToDo <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Links <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Website <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	Interactions <input type="text" value="U"/> <input type="text" value="D"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		
	History <input type="text" value="U"/> <input type="text" value="2"/> <input type="text" value="3"/> <input type="text" value="X"/>		

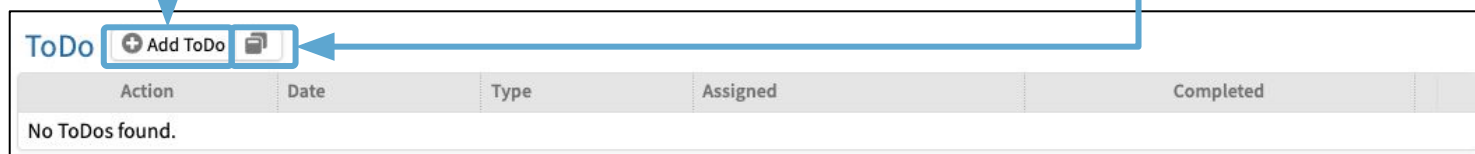
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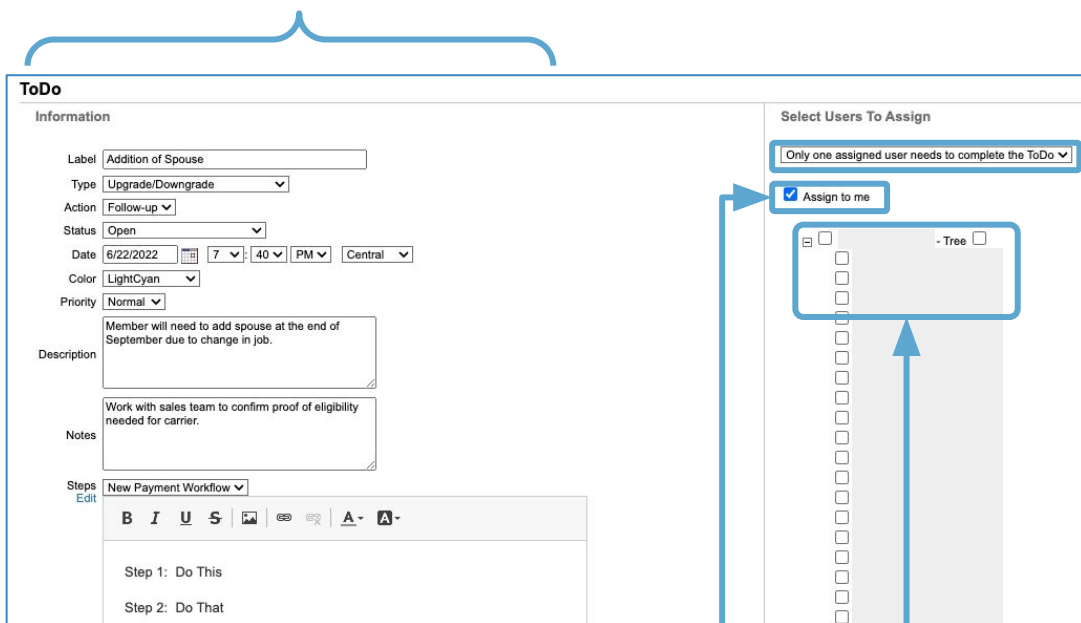
How to Set up a ToDo

- 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.



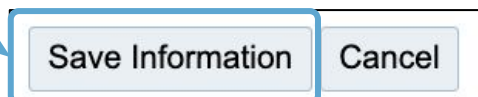
- 2 Set up the ToDo with the your personal steps required to complete the action. (See next page for 2.a - An Explanation of the Options and 2.b - Steps.)



- 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.”

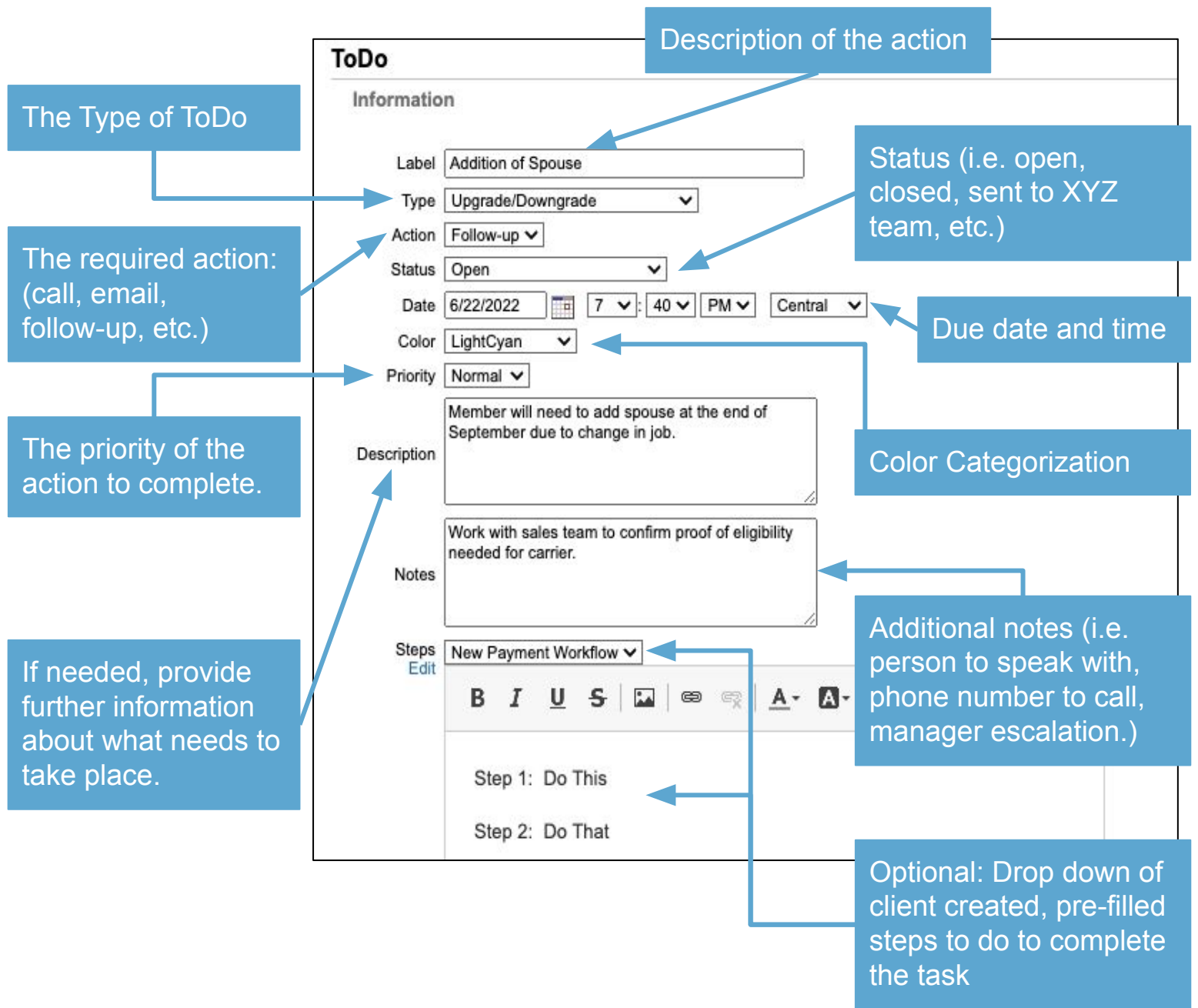


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A Closer Look at the Options and Flags to Complete a Task

2.a An Explanation of the Options:



The image shows a screenshot of the 'ToDo' form in the e123 system, with various fields and sections annotated with blue callouts explaining their purpose.

- Description of the action:** Points to the 'Label' field, which contains 'Addition of Spouse'.
- The Type of ToDo:** Points to the 'Type' dropdown menu, which is set to 'Upgrade/Downgrade'.
- The required action: (call, email, follow-up, etc.):** Points to the 'Action' dropdown menu, which is set to 'Follow-up'.
- Status (i.e. open, closed, sent to XYZ team, etc.):** Points to the 'Status' dropdown menu, which is set to 'Open'.
- Due date and time:** Points to the 'Date' field, which shows '6/22/2022' and the time '7:40 PM' in 'Central'.
- Color Categorization:** Points to the 'Color' dropdown menu, which is set to 'LightCyan'.
- The priority of the action to complete:** Points to the 'Priority' dropdown menu, which is set to 'Normal'.
- Description:** Points to the 'Description' text area, which contains the text: 'Member will need to add spouse at the end of September due to change in job.'
- Notes:** Points to the 'Notes' text area, which contains the text: 'Work with sales team to confirm proof of eligibility needed for carrier.'
- Additional notes (i.e. person to speak with, phone number to call, manager escalation.):** Points to the 'Steps' section, which has a dropdown menu set to 'New Payment Workflow'.
- Optional: Drop down of client created, pre-filled steps to do to complete the task:** Points to the 'Steps' section, which shows a list of steps: 'Step 1: Do This' and 'Step 2: Do That'.
- If needed, provide further information about what needs to take place:** Points to the 'Description' text area.

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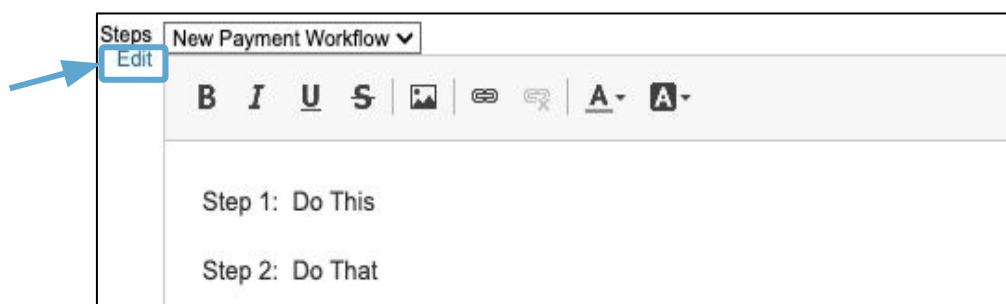
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A Closer Look at the Steps Options

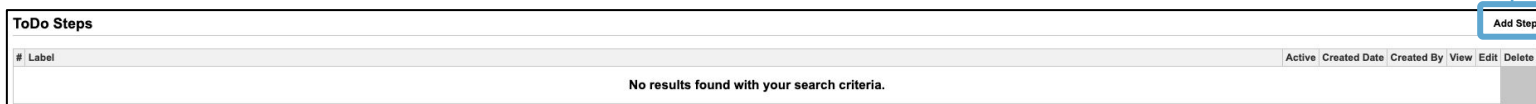
2.b Steps Options

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.

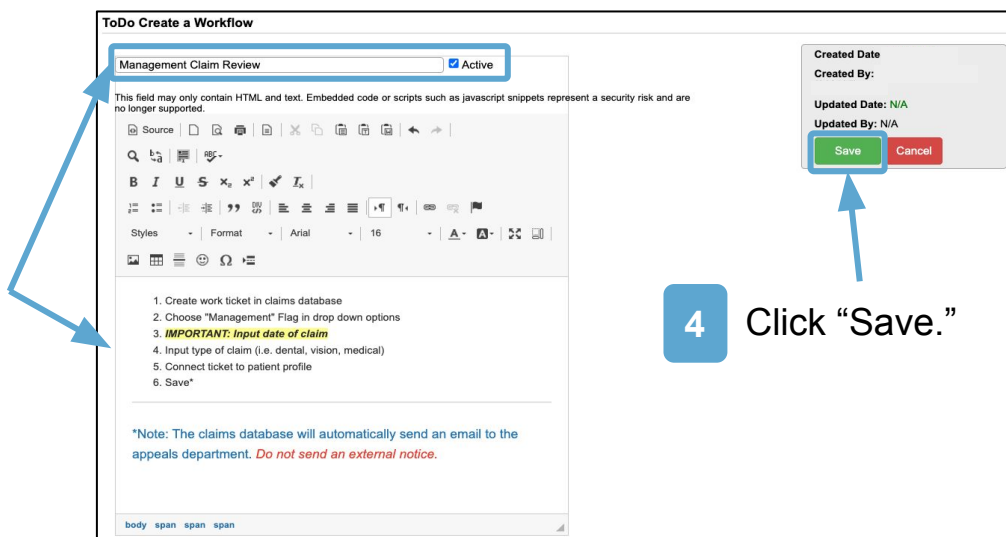


- 2 Click “Add Step” in the top right corner.



- 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.”

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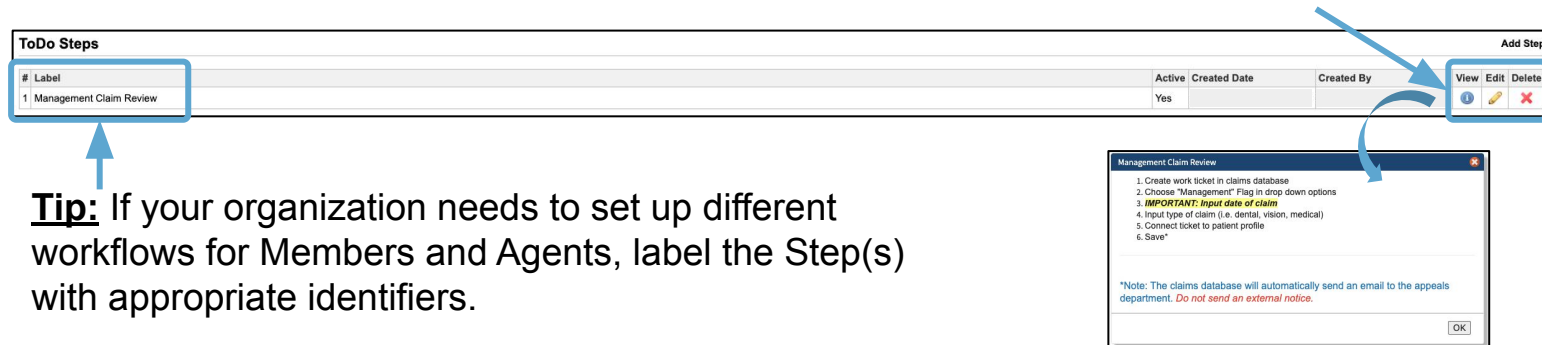
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A Closer Look at the Steps Options - continued

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.

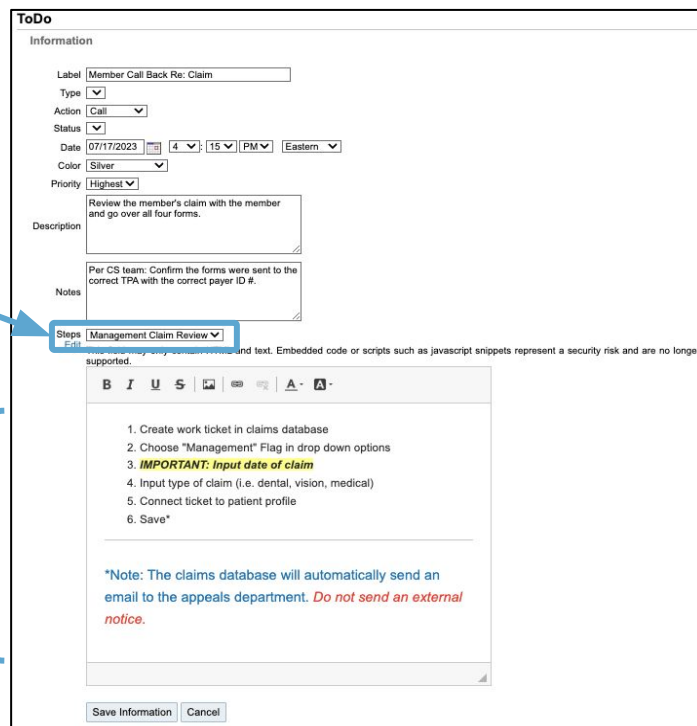
“View” - “Edit” - “Delete”



Tip: 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.



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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.



The image shows a navigation menu on the left with a red gear icon highlighted. A blue arrow points from the gear icon to the 'Drop Down Options' menu item, which is also highlighted with a blue box. Another blue arrow points from the 'Drop Down Options' menu item to a screenshot of the 'ToDo Colors' table.





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

#	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







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


ToDo		Add ToDo			
Action	Date	Type	Assigned	Completed	
 Call	Monday, June 20, 2022 at 8:00 AM Pacific	Welcome member to association Welcome call Highest	User: <input type="text"/>	None	  

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: <input type="text"/>							<input type="checkbox"/>		
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: <input type="text"/>							<input type="checkbox"/>		

3 Calendar view

20


8:00 AM Pacific
Welcome member to association
Type: Welcome call
Member: TEST
MEMBER Test
Company
Add to Calendar

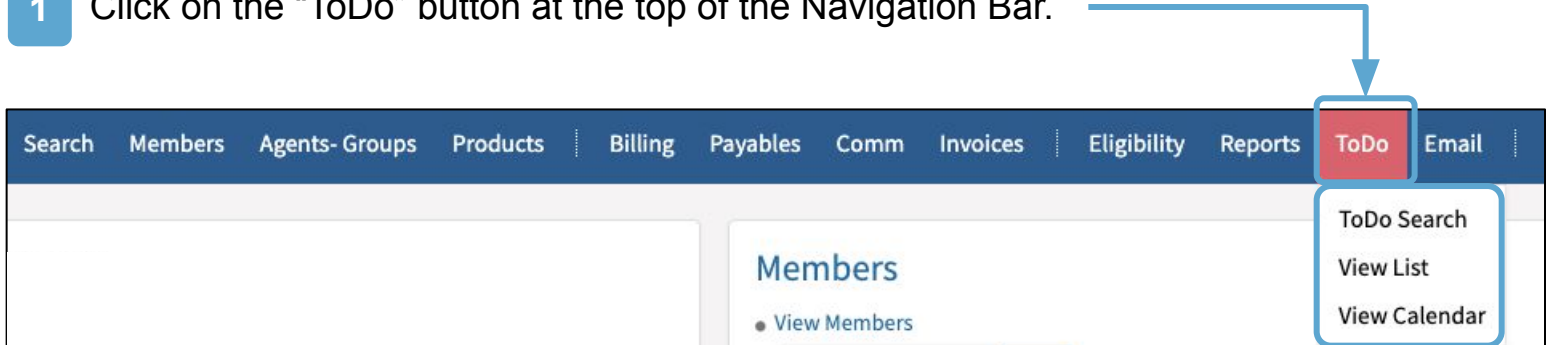
Note: If a User does not see a ToDo they were assigned, make sure that they have the right security settings.

The Navigation Bar: Viewing of ToDos

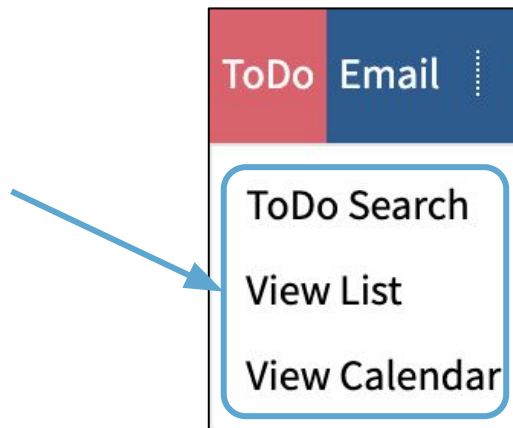
One of the main questions we receive is, “Where do you find ToDos in the system when you’re not on a direct Member or Agent’s profile?”

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.



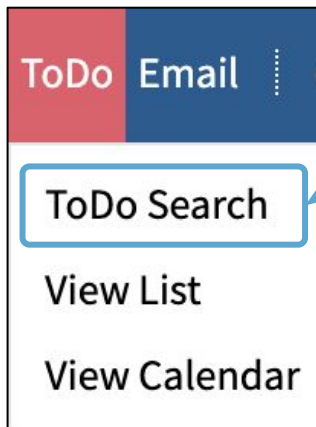
On the following pages, we will walk through what each of these options offers.

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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.

 **ToDo Search**

Completed
☐ Any ☐ Yes ☒ No

Member First Name
Member Last Name
Member ID
Member assigned Agent-Group ID **Agent-Group Username** **Days Before Due**

☐ Tree

Past Due
☐ Days Past:

Created Date
 From To

Scheduled Date
 From To ☐ Blank
 Completed Date
 From To ☐ Blank

Type
 Any
 Follow up about billing
 Welcome call
☐ Not
☐ Blank

Action
 Any
 Call
 Email
 Fax
 Follow-up
☐ Not
☐ Blank

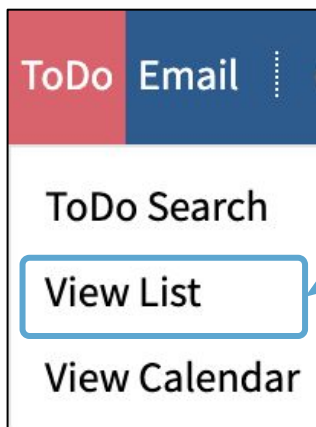
Hint: If you are unable to find a ToDo you are looking for, if you have a lot of filters chosen, try broadening your search instead of narrowing it. You may have inadvertently refined your search too much.

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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.

ToDo List All Users - Change User - View All

Total: 5 • Page: 1

Scheduled Date ▼

#	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		Follow up about billing	Member Request Call Back	Follow-up	View				<input checked="" type="checkbox"/>				<input type="checkbox"/>
2	Wednesday 6/15/2022 1:03 PM	Friday 6/24/2022 12:27 PM		9		Follow up about billing	Open	Payment	View				<input checked="" type="checkbox"/>				<input type="checkbox"/>
3	Wednesday 6/15/2022 12:58 PM	Wednesday 6/22/2022 7:40 PM		7		Upgrade/Downgrade	Open	Follow-up	View Steps				<input type="checkbox"/>				<input type="checkbox"/>
4	Wednesday 6/15/2022 12:45 PM	Monday 6/20/2022 8:00 AM		5		Welcome call		Call	View				<input type="checkbox"/>				<input type="checkbox"/>
5	Wednesday 6/15/2022 12:43 PM	Friday 6/17/2022 6:23 PM		2		Follow up about billing		Call	View				<input type="checkbox"/>				<input type="checkbox"/>

✓ Scheduled Date

Today

Tomorrow

Yesterday

Last 7 Days

Next 7 Days

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.

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	atch
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				<input checked="" type="checkbox"/>				<input type="checkbox"/>
2	Wednesday 6/15/2022 1:03 PM	Friday 6/24/2022 12:27 PM		9		Follow up about billing	Open	Payment	View				<input checked="" type="checkbox"/>				<input type="checkbox"/>
3	Wednesday 6/15/2022 12:58 PM	Wednesday 6/22/2022 7:40 PM		7		Upgrade/Downgrade	Open	Follow-up	View	Steps			<input checked="" type="checkbox"/>				<input type="checkbox"/>
4	Wednesday 6/15/2022 12:45 PM	Monday 6/20/2022 8:00 AM		5		Welcome call		Call	View				<input checked="" type="checkbox"/>				<input type="checkbox"/>
5	Wednesday 6/15/2022 12:43 PM	Friday 6/17/2022 6:23 PM		2		Follow up about billing		Call	View				<input checked="" type="checkbox"/>				<input type="checkbox"/>

2

You'll be able to:

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

ToDo Item

Follow-up
Tuesday, June 28, 2022 at 10:08 AM Eastern - High
Follow up about billing
Member: [Test](#)
Testropolis, AZ 85001
(714) 555-5555
Email:
Call member to confirm that she see's the payment having cleared on her end from her bank account.

☒ COMPLETE EDIT CALENDAR

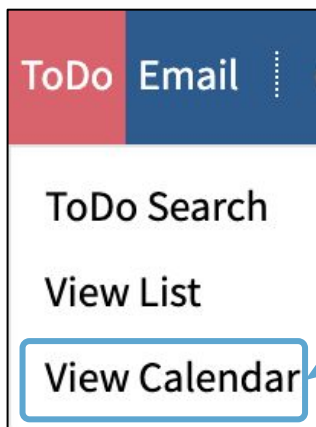
Created: 06/15/2022 at 1:04:44 PM

Helpful features:

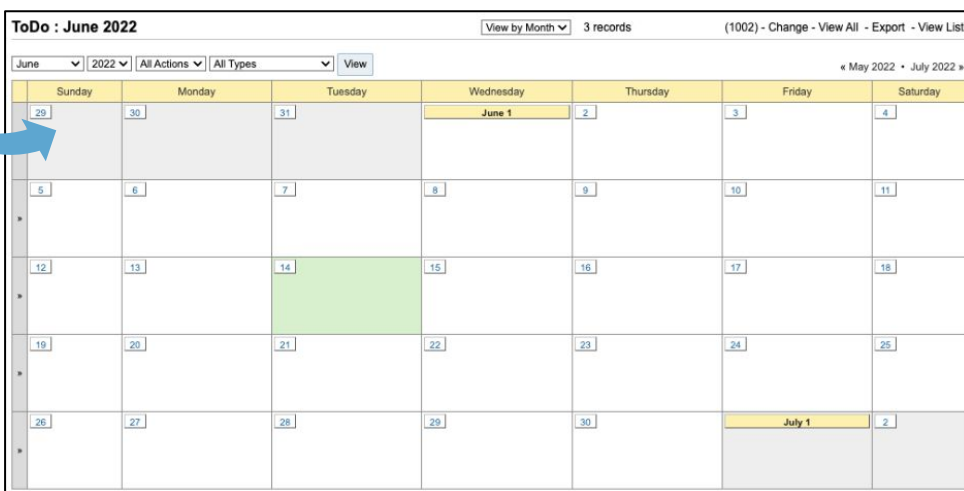
A user can download a file that they can then import into an outside calendar such as Outlook.

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

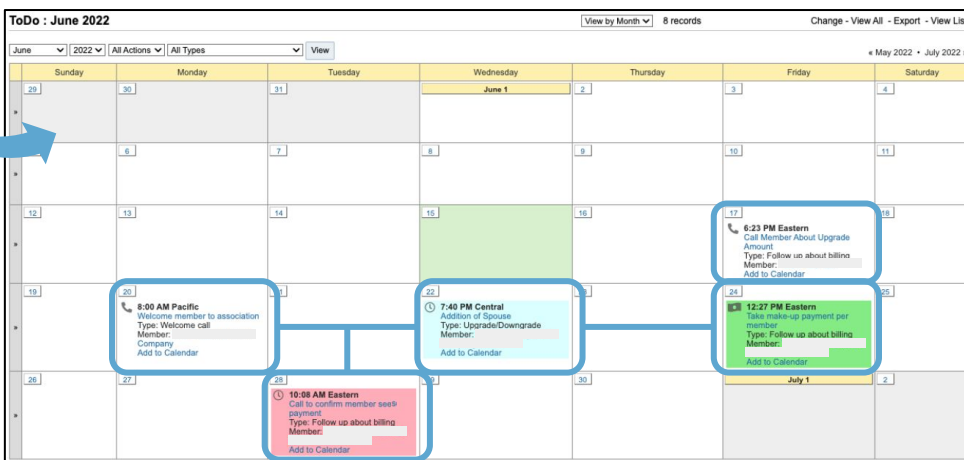


Example views:

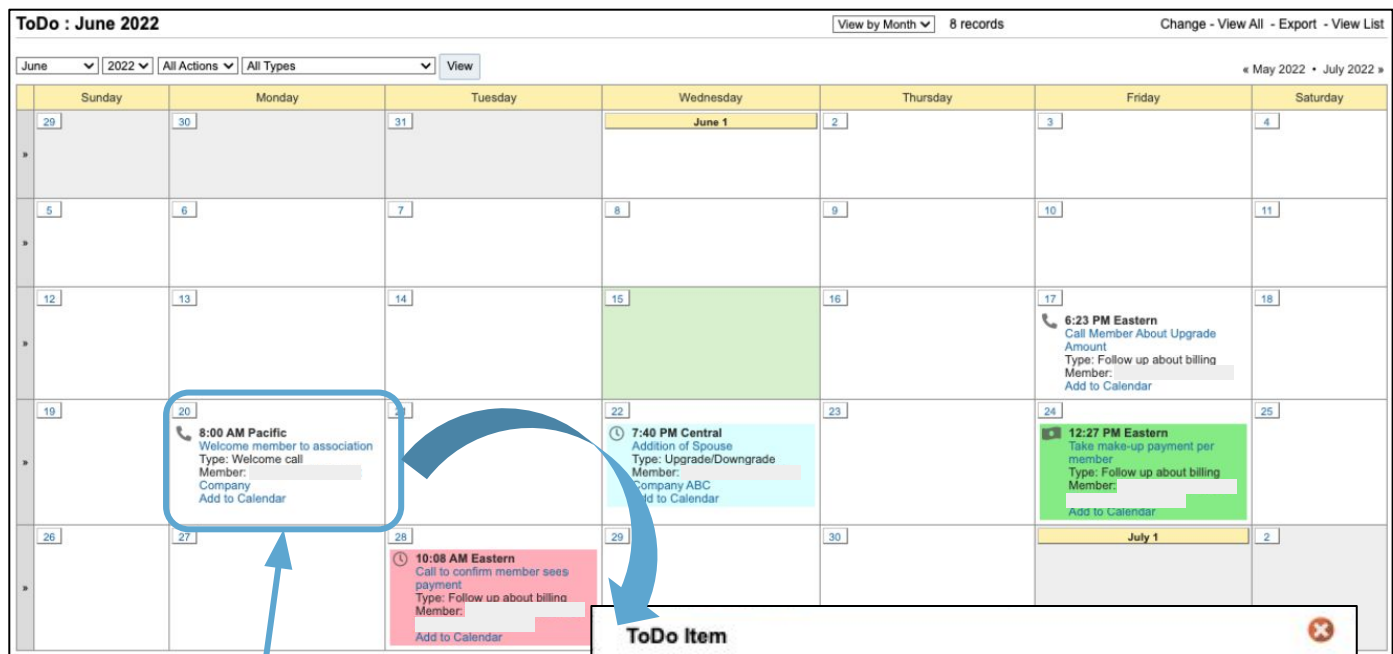
A) The first calendar shows what it will look like when there are no Todos set up for a User for the chosen month.

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

B) Calendar with Todos



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



ToDo : June 2022 View by Month 8 records Change - View All - Export - View List

June 2022 All Actions All Types View « May 2022 • July 2022 »

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	June 1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	July 1	2

ToDo Item

Welcome member to association
Call

Monday, June 20, 2022 at 8:00 AM Pacific - Highest
Welcome call
Member: [Redacted]
Phone: (949) 123-4567
Email: [Redacted]

Call member first thing in the morning before she goes to work.

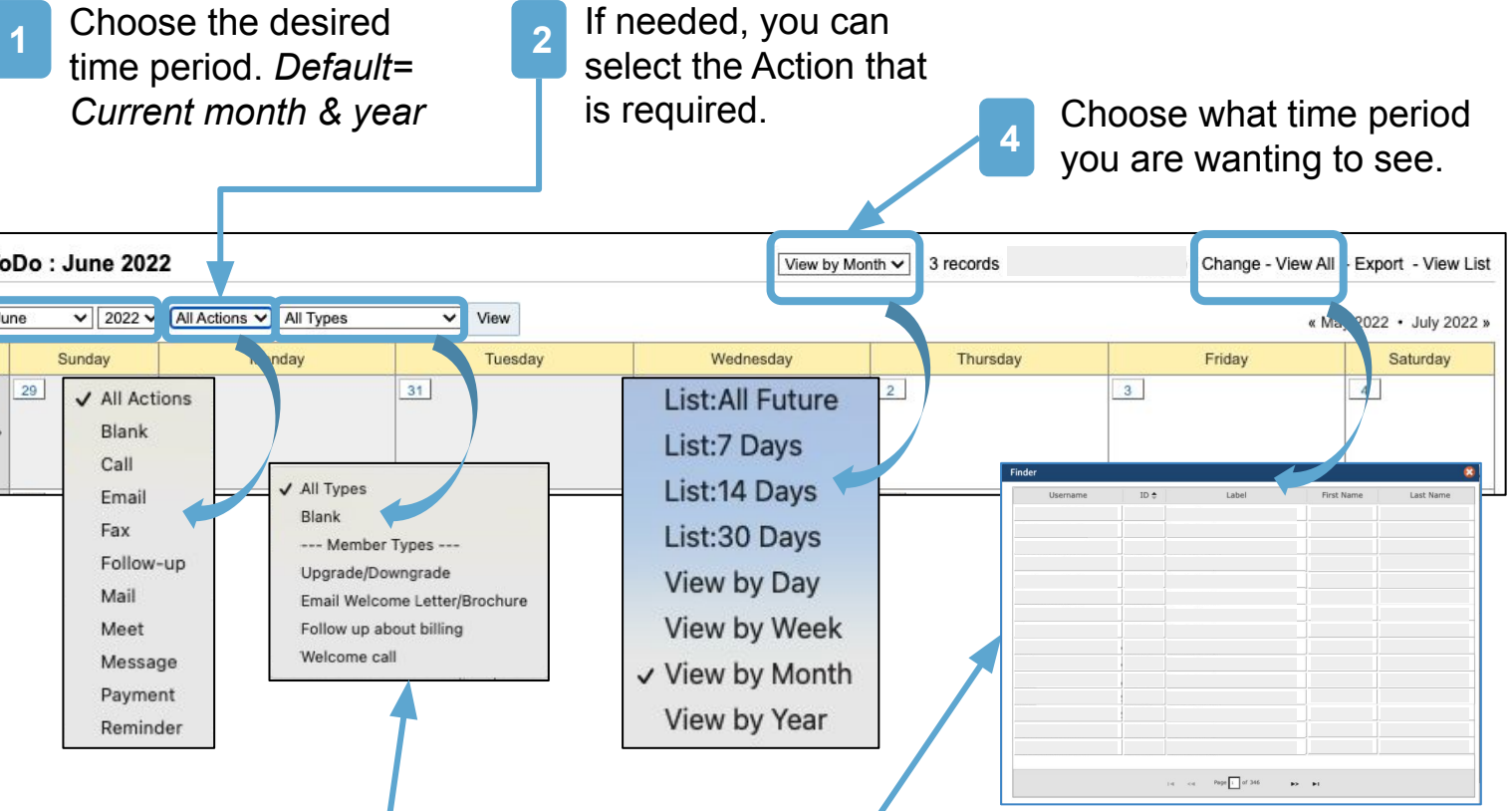
☒ COMPLETE ☐ EDIT ☐ CALENDAR

Created: 06/15/2022 at 12:45:17 PM by [Redacted]

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.

3 Select the Type of ToDo you are looking for.

4 Choose what time period you are wanting to see.

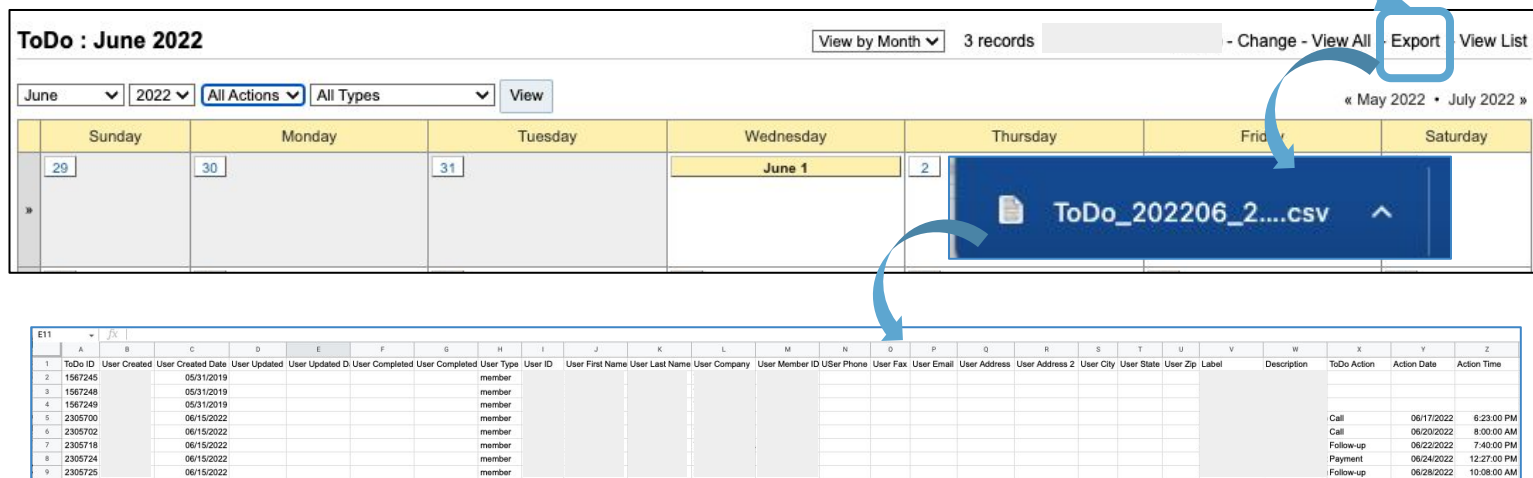
5 To choose which person's ToDos you see:
Click "Change" next to the current Username, and scroll down through the list to who you're looking for. Or, click "View All" to see everyone's ToDos at once.

The screenshot shows the 'ToDo : June 2022' header with filters for 'June', '2022', 'All Actions', and 'All Types'. A 'View' button is present. Below the header is a calendar grid for June 2022. A dropdown menu for 'All Actions' is open, showing options like 'Blank', 'Call', 'Email', 'Fax', 'Follow-up', 'Mail', 'Meet', 'Message', 'Payment', and 'Reminder'. Another dropdown menu for 'All Types' is open, showing options like 'Blank', 'Member Types', 'Upgrade/Downgrade', 'Email Welcome Letter/Brochure', 'Follow up about billing', and 'Welcome call'. A third dropdown menu for 'View by' is open, showing options like 'List:All Future', 'List:7 Days', 'List:14 Days', 'List:30 Days', 'View by Day', 'View by Week', 'View by Month' (selected), and 'View by Year'. A 'Change' button is visible next to the 'View by Month' dropdown. A 'Finder' window is open, showing a list of users with columns for Username, ID, Label, First Name, and Last Name. The 'Change' button is highlighted with a blue box, and an arrow points from it to the 'Finder' window.

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 : June 2022 View by Month 3 records - Change - View All **Export** View List

June 2022 All Actions All Types View « May 2022 • July 2022 »

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
29	30	31	June 1	2		

ToDo_202206_2....csv

ToDo ID	User Created	User Created Date	User Updated	User Updated Date	User Completed	User Completed Date	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
1	1567245	05/31/2019					member																		
2	1567248	05/31/2019					member																		
3	1567249	05/31/2019					member																		
4	2305700	06/15/2022					member																		
5	2305702	06/15/2022					member																		
6	2305718	06/15/2022					member																		
7	2305724	06/15/2022					member																		
8	2305725	06/15/2022					member																		
9																									

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

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

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		Follow up about billing	Member Request Call Back Follow-up						<input checked="" type="checkbox"/>				
2	Wednesday 6/15/2022 1:03 PM	Friday 6/24/2022 12:27 PM		9		Follow up about billing	Open	Payment	View				<input checked="" type="checkbox"/>				

#	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 1:03 PM	Friday 6/24/2022 12:27 PM		2		Follow up about billing	Open	Payment	View				<input checked="" type="checkbox"/>				
2	Wednesday 6/15/2022 12:58 PM	Wednesday 6/22/2022 7:40 PM		0		Upgrade/Downgrade	Open	Follow-up	View Steps				<input checked="" type="checkbox"/>				

or

B

On the calendar: Click “Complete.”

ToDo Item

Follow-up
Tuesday, June 28, 2022 at 10:08 AM Eastern - High
Follow up about billing
Member: [Test](#)
Testropolis, AZ 85001
(714) 555-5555
Email:

☒ COMPLETE EDIT CALENDAR

Created: 06/15/2022 at 1:04:44 PM by

28

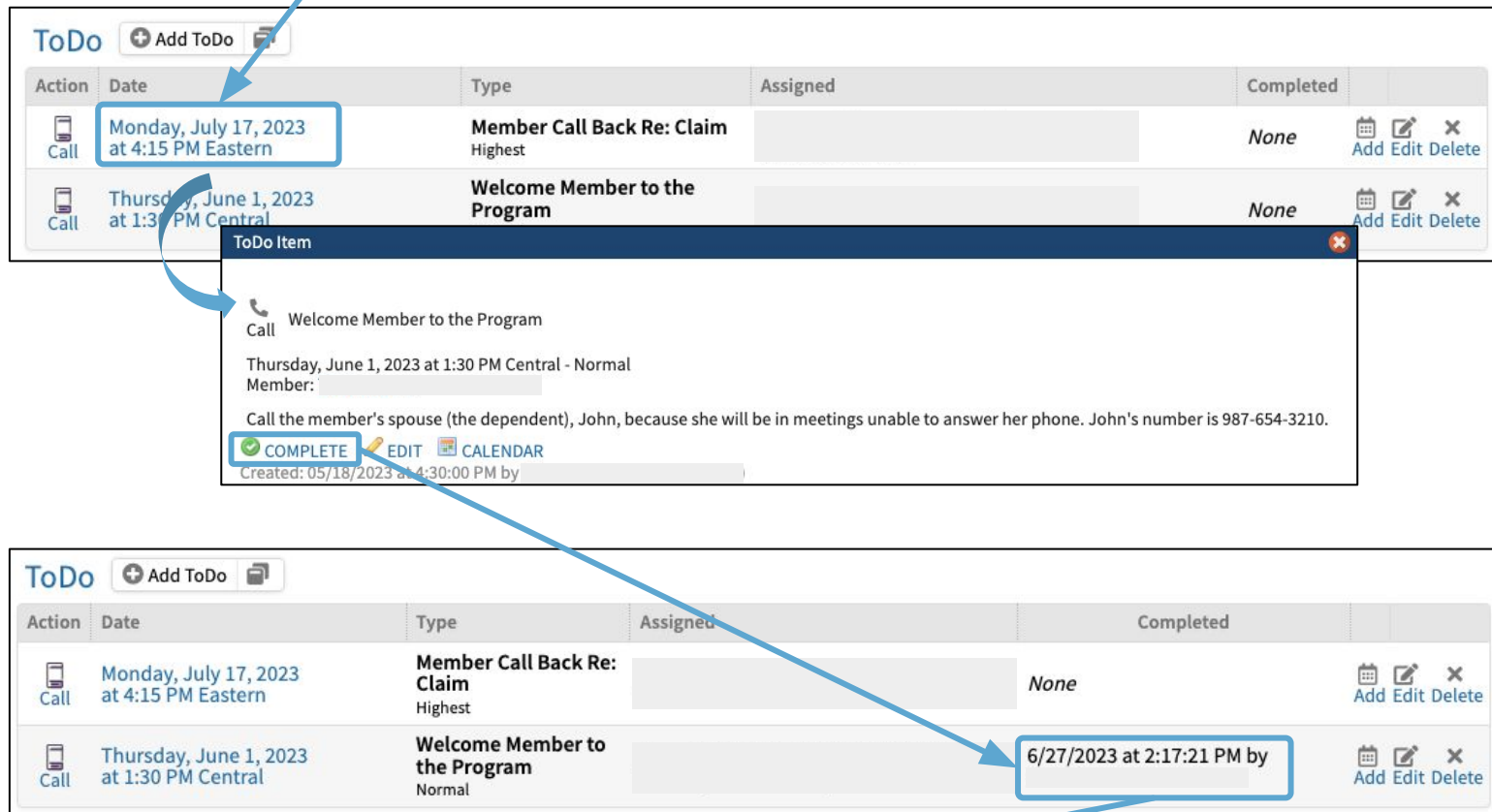
10:08 AM Eastern
☒ Call to confirm member sees payment
Type: Follow up about billing
Member: [Test](#)
[Add to Calendar](#)

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 From the Member or Agent profile: Click the date the ToDo is supposed to take place. Click “Complete.”



The screenshot shows the e123 ToDo interface. At the top, there is a 'ToDo' header with an 'Add ToDo' button. Below this is a table with columns: Action, Date, Type, Assigned, and Completed. The table contains two rows:

Action	Date	Type	Assigned	Completed
Call	Monday, July 17, 2023 at 4:15 PM Eastern	Member Call Back Re: Claim Highest		None
Call	Thursday, June 1, 2023 at 1:30 PM Central	Welcome Member to the Program		None

A modal window titled 'ToDo Item' is open, showing details for the 'Welcome Member to the Program' task. It includes a 'Call' icon, the task name, the date and time, and a description: 'Call the member's spouse (the dependent), John, because she will be in meetings unable to answer her phone. John's number is 987-654-3210.' At the bottom of the modal, there are buttons for 'COMPLETE', 'EDIT', and 'CALENDAR'. The 'COMPLETE' button is highlighted with a blue box. A blue arrow points from the 'COMPLETE' button in the modal to the 'Completed' column in the table below.

The second screenshot shows the same table, but the 'Completed' column now displays '6/27/2023 at 2:17:21 PM by' for the 'Welcome Member to the Program' task. A blue box highlights this text, and a blue arrow points from the 'COMPLETE' button in the modal to this box.

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.

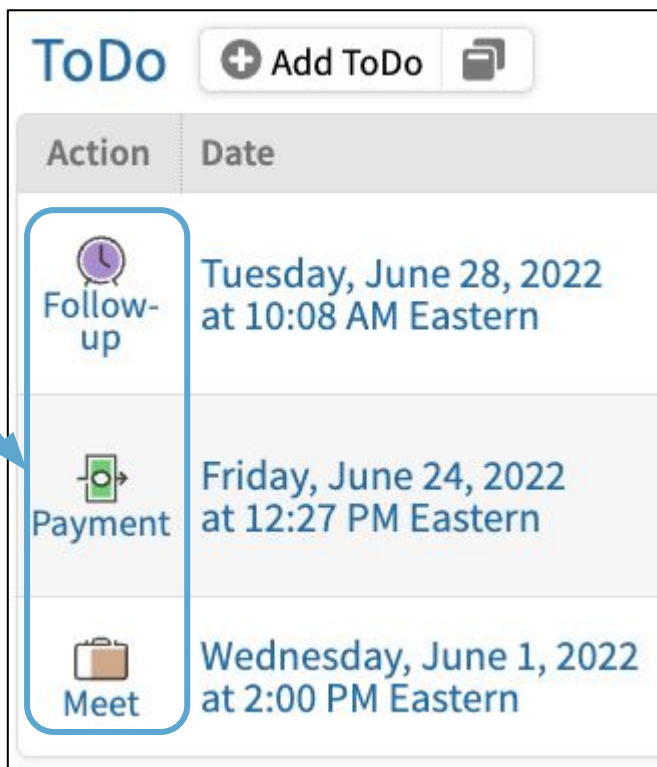
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ToDo Icons

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.



Action	Date
 Follow-up	Tuesday, June 28, 2022 at 10:08 AM Eastern
 Payment	Friday, June 24, 2022 at 12:27 PM Eastern
 Meet	Wednesday, June 1, 2022 at 2:00 PM Eastern

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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