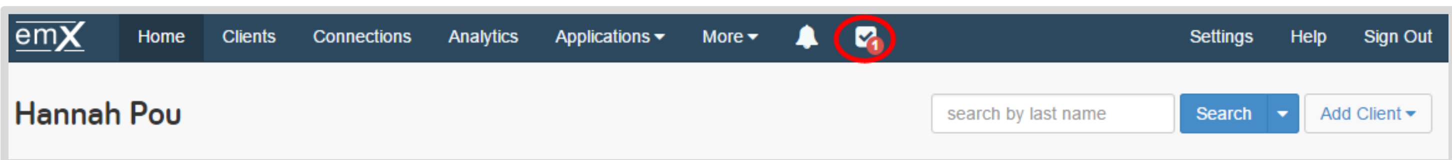
Client Tasks & Next Steps

In this training userguide, we will demonstrate how to assign your client an action item to complete. You can create a custom Task or add a custom Next Step specific to your client. The action items will appear in your client's website, under the Client Tasks icon in the navigation bar. A complete list of all tasks assigned to your clients will also appear under "View All" when the Tasks icon is selected on the Advisor Navigation Bar.

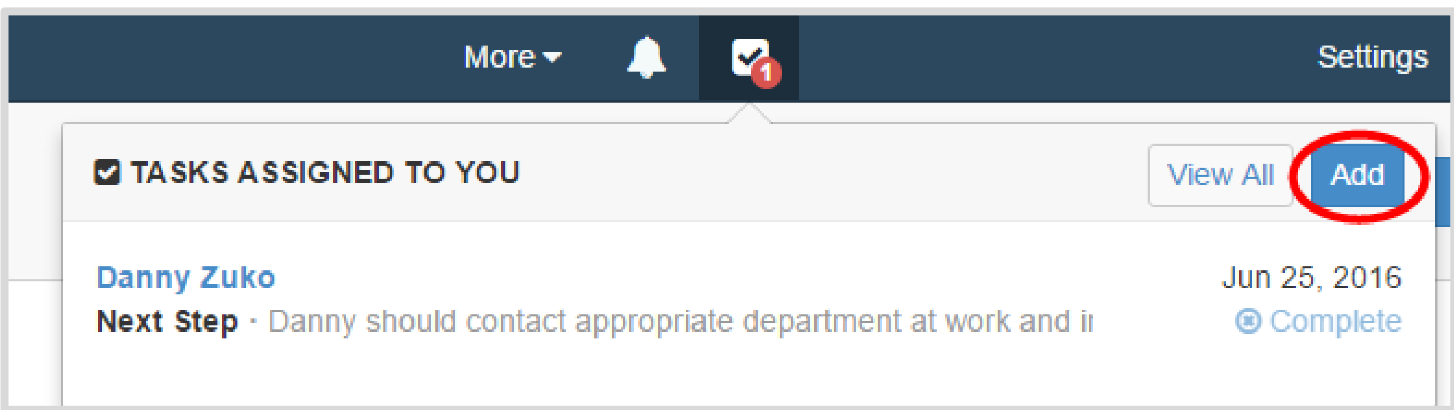
This guide is broken into two sections: Setup & the Client Experience (pg 7).

Set Up

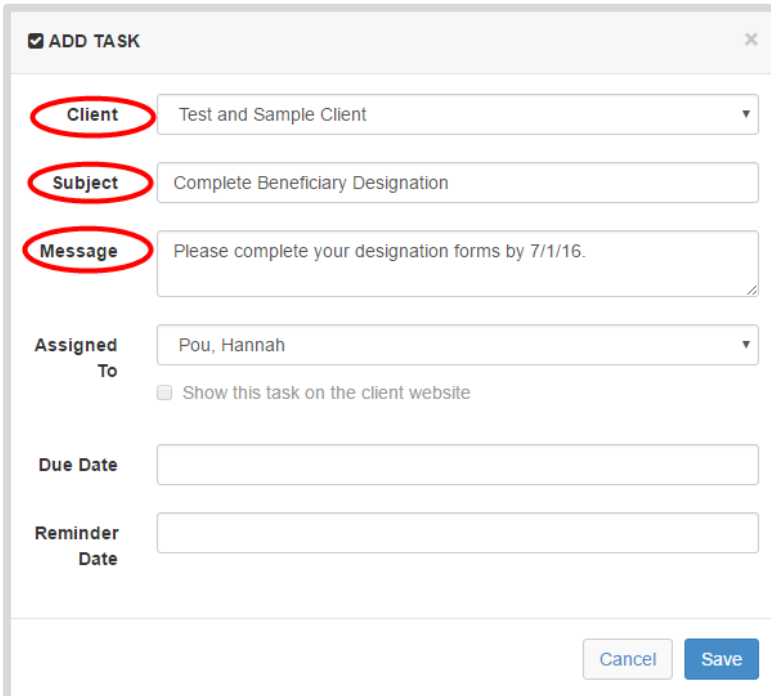
1. To create a new task, click the **Tasks icon** from the Navigation Bar.



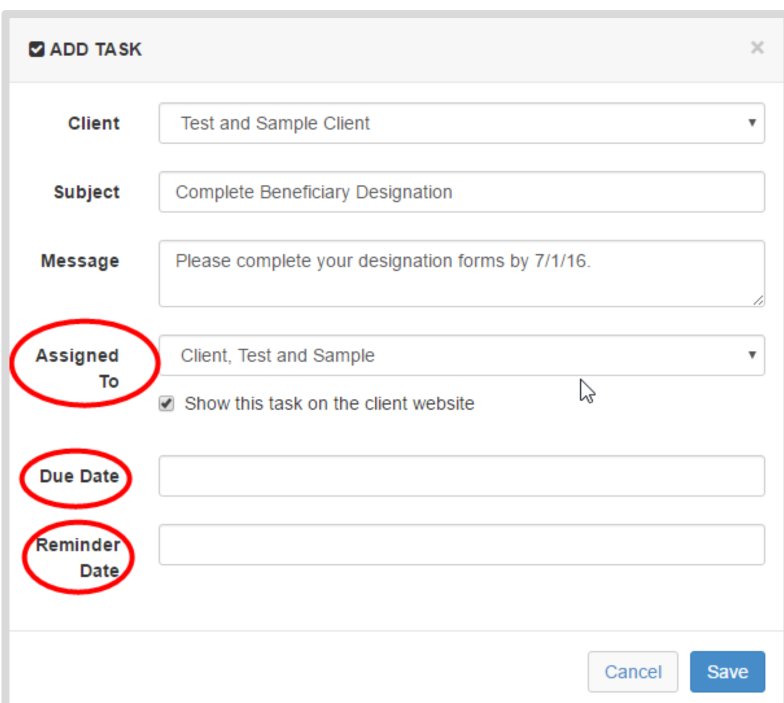
2. Click **Add**.



3. Each task is associated with a particular client and then assigned to either a user in your office or the client themselves. Select the client and fill out task subject and message.



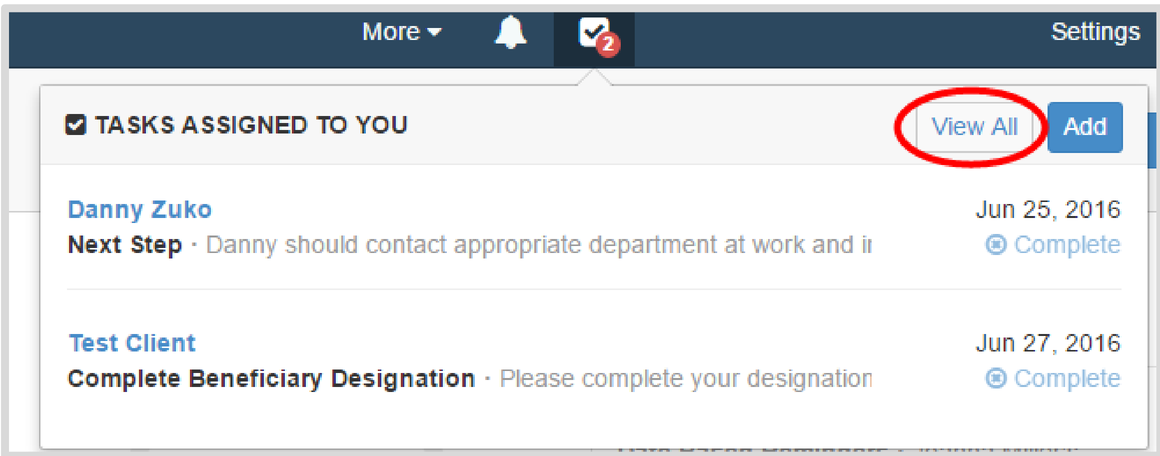
4. To assign the task specifically to your client, select the client from the **Assigned To** drop down menu. Enter a Due Date and a Reminder Date. Click **Save**.



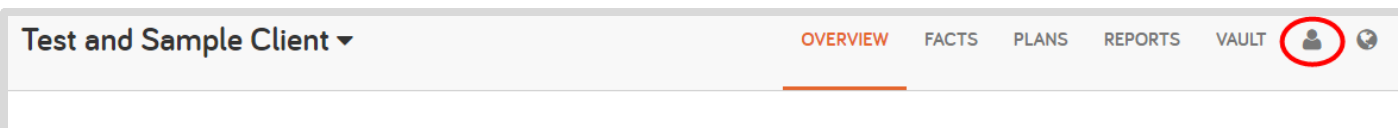
Please Note: you can uncheck whether or not you want this task to appear on the client's website.
You are able to modify this at any point.

5. To review a task, click the Tasks icon and click the Task subject to see the detailed view. To see a summary of ALL tasks, click **View All.**

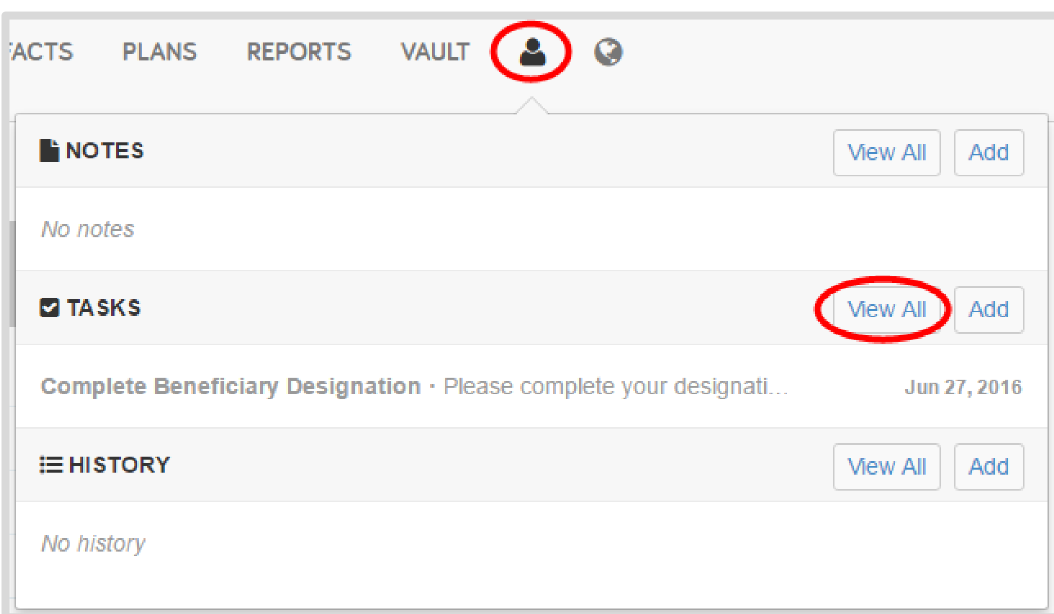
> **Please Note:** Only tasks assigned to you or that you assigned will appear in this menu.



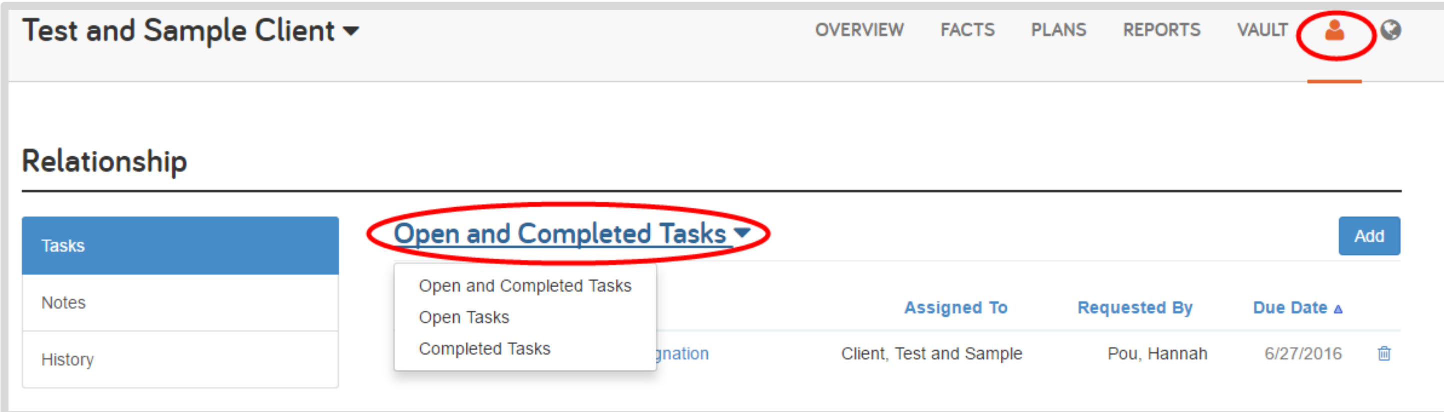
6. To see all actionable items for a particular client, select that client from your client list and click the **Notes, Tasks, and History** icon.



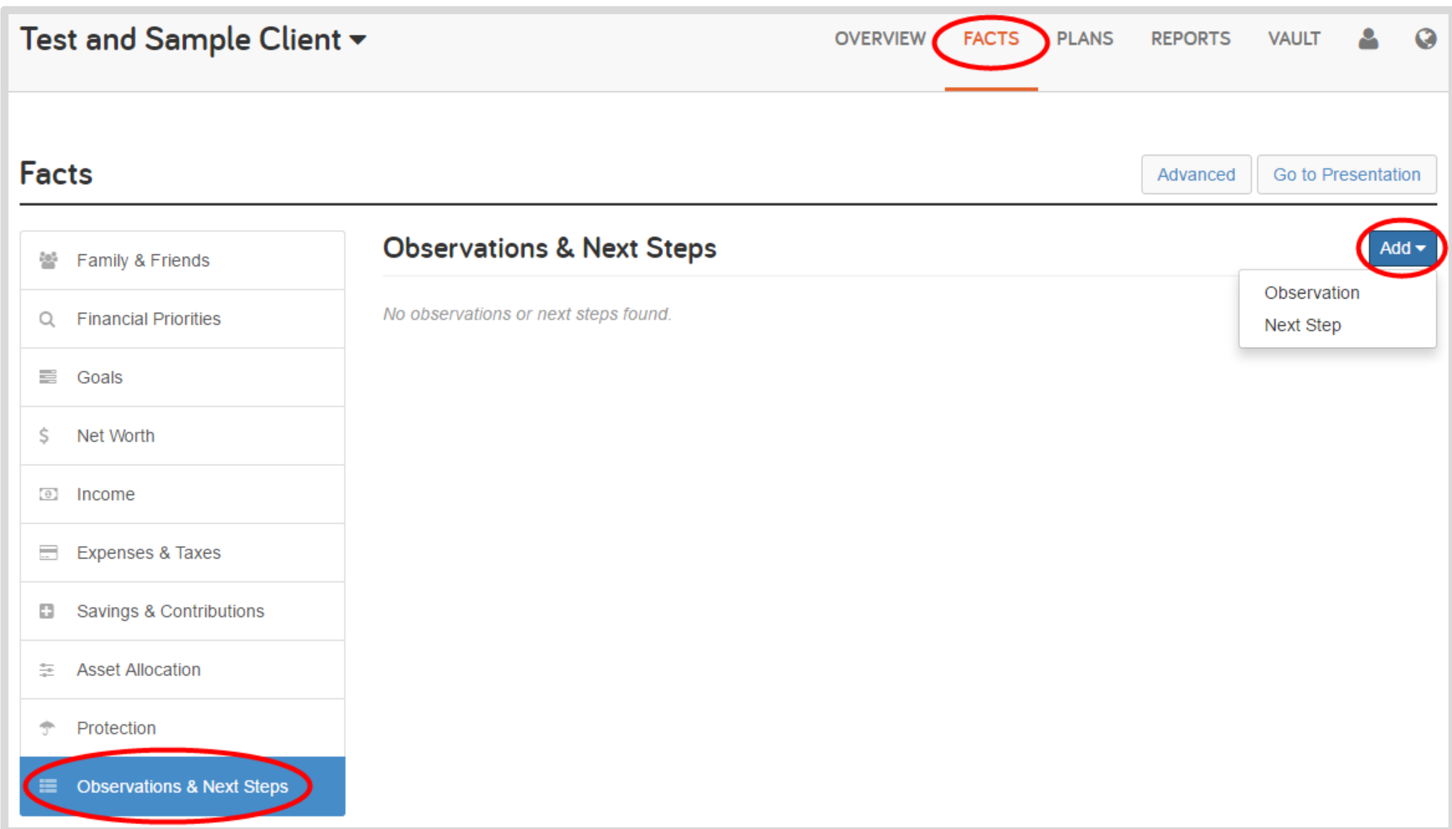
7. Click **View All.**



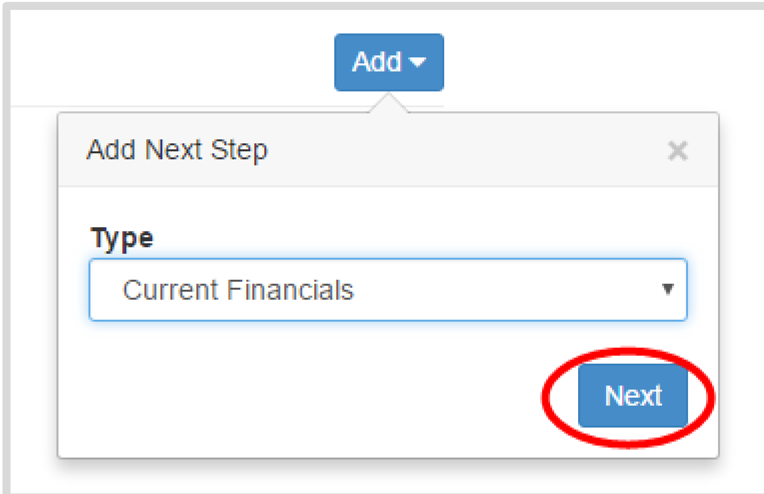
8. Click Open & Completed Tasks to change your view.



9. To assign a Next Step, click **Facts** and **Observations & Next Steps**. Click **Add**, then **Next Step**.

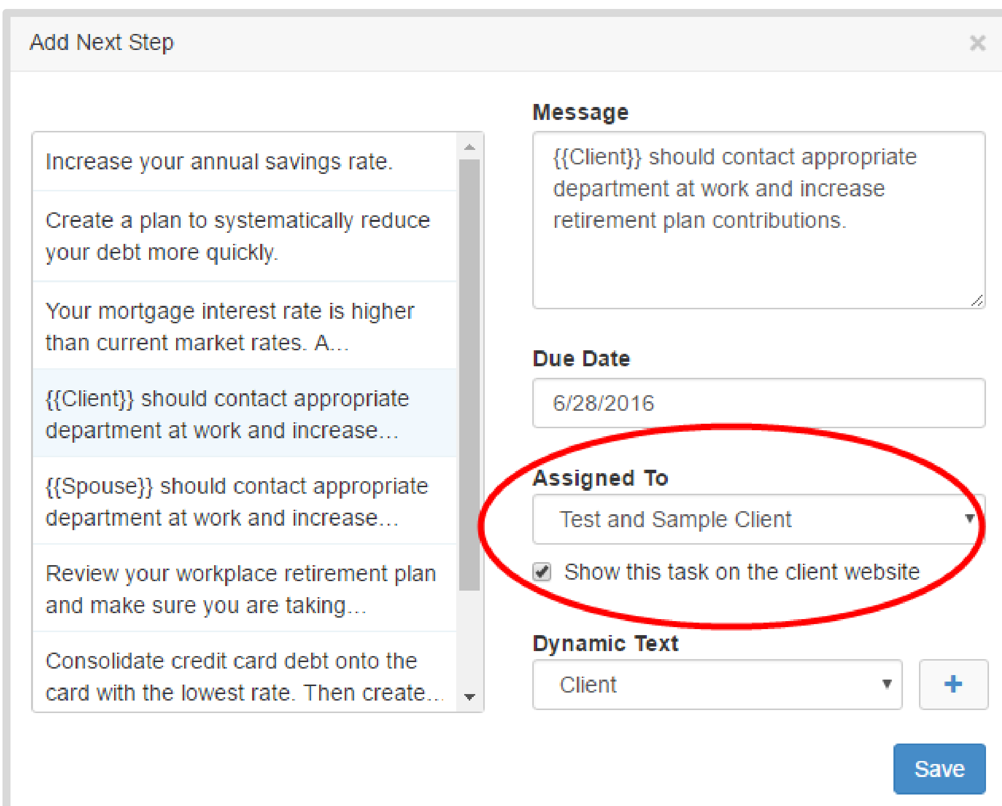


10. Choose the Type and click Next. In this example we chose Current Financials.

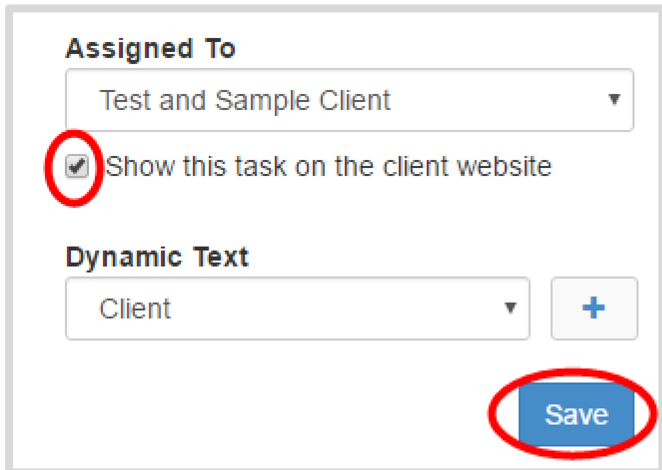


11. You will see a list of available Next Step templated messages. Chose the appropriate Next Step and edit the message as needed. Assign a Due Date and choose whether this Next Step is assigned to someone in your office or the client.

Please Note: Words & phrases in brackets indicate that this is dynamic text that will update and reflect that particular clients situation based on the facts entered.



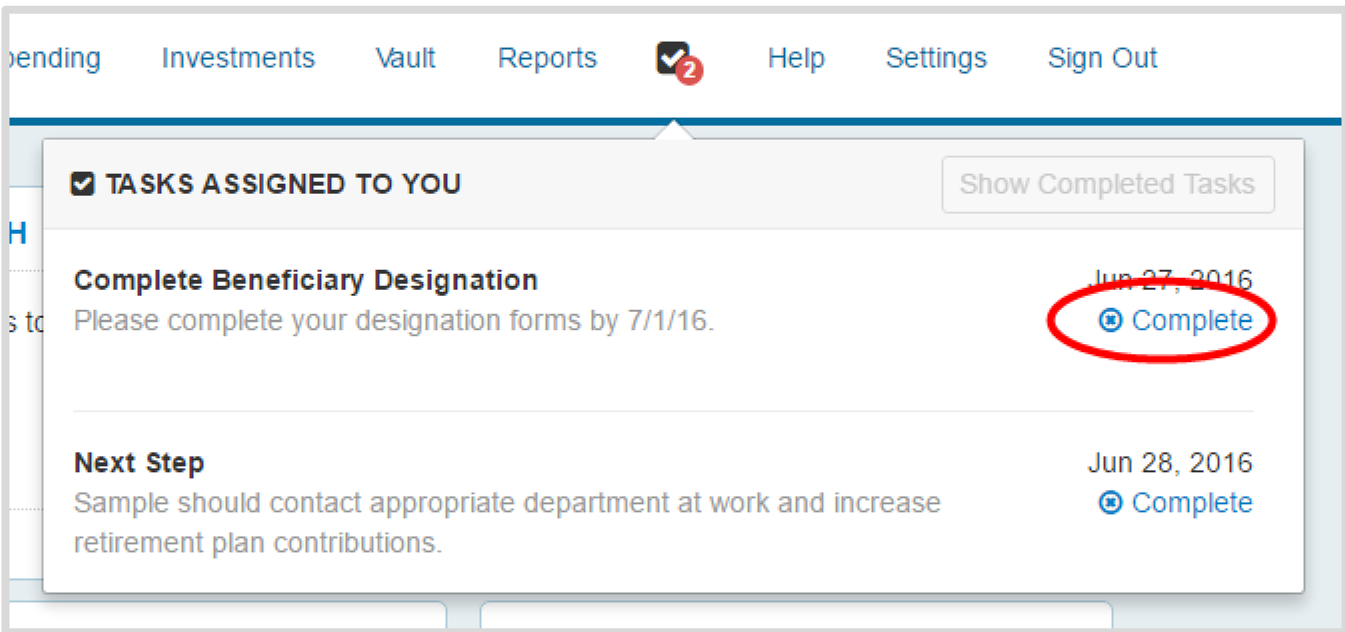
12. Check the **Show this task on the client website** box to have this Next Step appear on the website. Click **Save**.



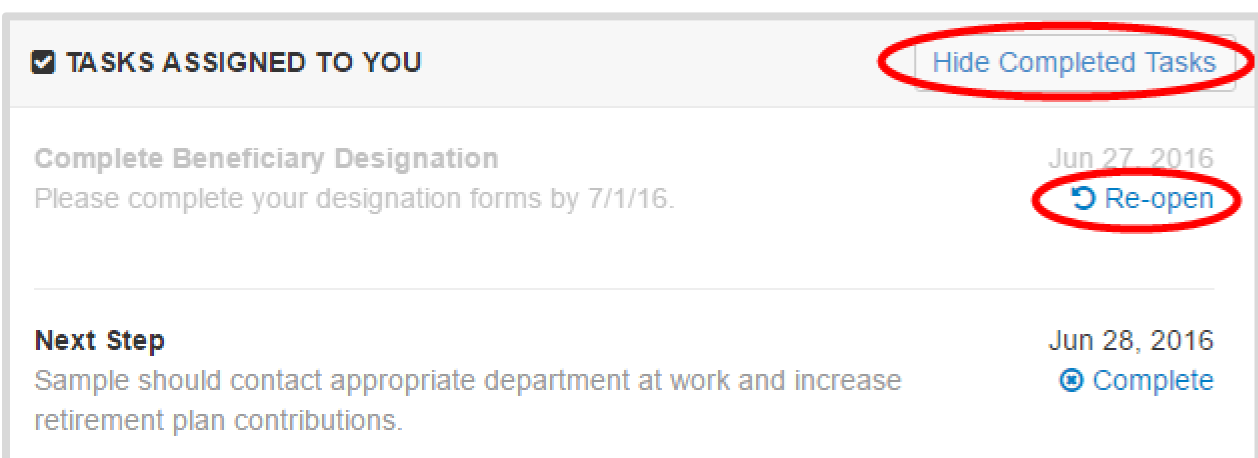
Client Experience

1. Assigned action items, Tasks or Next Steps, will appear from the **Tasks** icon in the client's navigation bar.

2. A list of assigned tasks will appear. When a client has completed a Task or Next Step they will click the **Complete** button.



3. Once an item has been completed they have the option to Hide Completed Tasks. The client will also be able to open a previously completed task by clicking Re-open.



4. Once a task has been completed, this will update on the advisor side. To see a list of completed tasks for the client, from the Client page, click the **Notes, Tasks, and History** icon. Here you can choose to view all tasks and select **Completed Tasks** from the view dropdown menu.