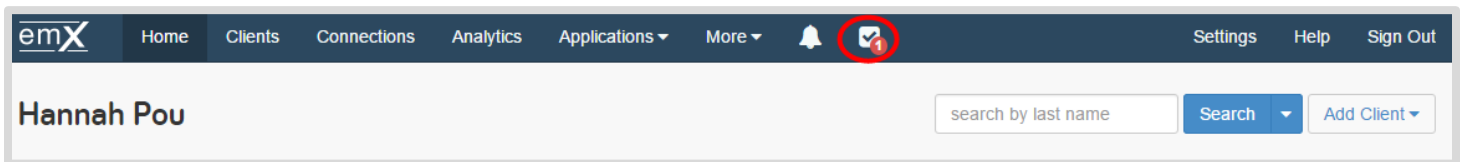


In this training userguide, we will demonstrate how to assign your client an action item to complete. You can create a custom Task or add a custom Next Step specific to your client. The action items will appear in your client's website, under the Client Tasks icon in the navigation bar. A complete list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

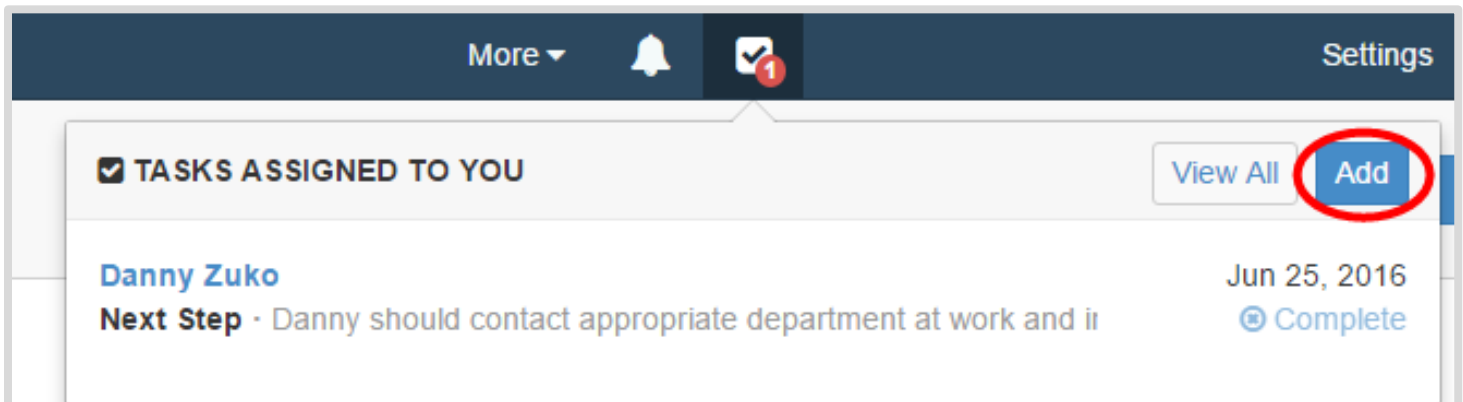
This guide is broken into two sections: Setup & the Client Experience (pg 7).

Set Up

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



2. Click **Add**.



- 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.

ADD TASK

Client Test and Sample Client

Subject Complete Beneficiary Designation

Message Please complete your designation forms by 7/1/16.

Assigned To Pou, Hannah

Show this task on the client website

Due Date

Reminder Date

Cancel Save

- 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**.

ADD TASK

Client Test and Sample Client

Subject Complete Beneficiary Designation

Message Please complete your designation forms by 7/1/16.

Assigned To Client, Test and Sample

Show this task on the client website

Due Date

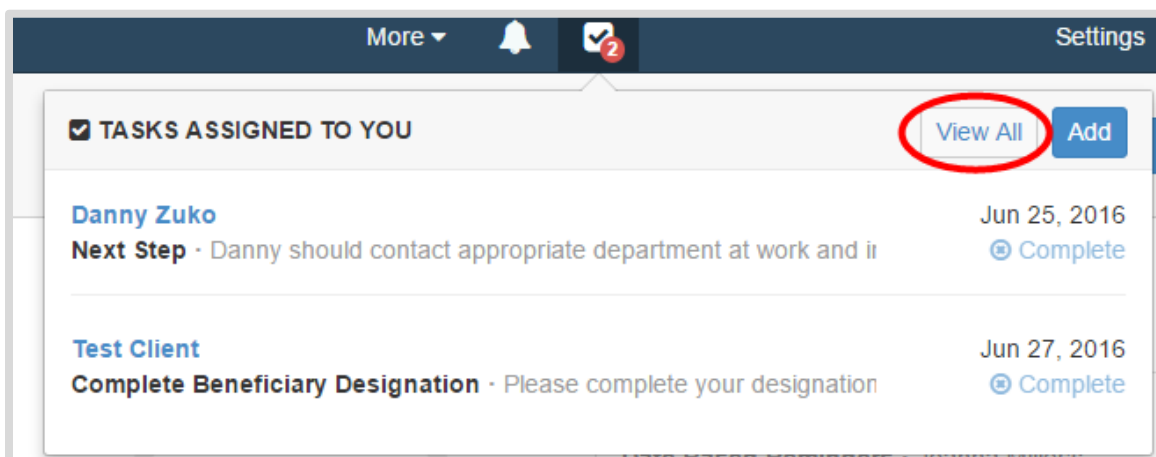
Reminder Date

Cancel Save

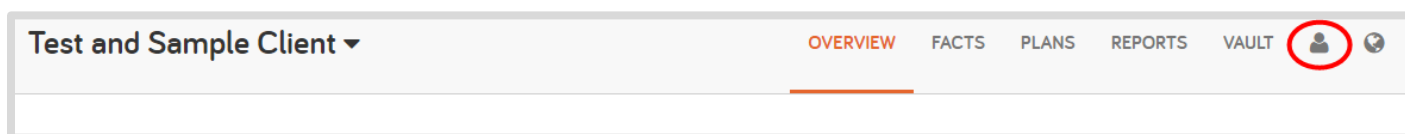
Please Note: you can uncheck whether or not you want this task to appear on the client's website. You are able to modify this at any point.

- 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**.

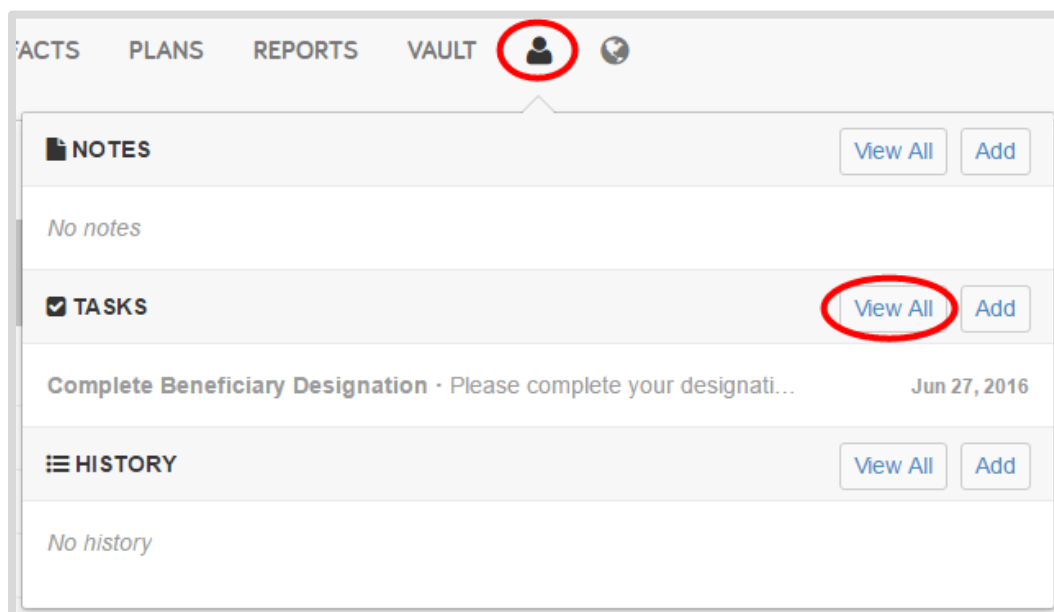
Please Note: Only tasks assigned to you or that you assigned will appear in this menu.



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



- Click **View All**.



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

Test and Sample Client ▾ OVERVIEW **FACTS** PLANS REPORTS VAULT

Relationship

Tasks **Open and Completed Tasks** ▾ Add

- Open and Completed Tasks
- Open Tasks
- Completed Tasks

	Assigned To	Requested By	Due Date ▲
ignation	Client, Test and Sample	Pou, Hannah	6/27/2016

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

Test and Sample Client ▾ OVERVIEW **FACTS** PLANS REPORTS VAULT

Facts Advanced Go to Presentation

Observations & Next Steps

No observations or next steps found.

Add ▾

- Observation
- Next Step

- Family & Friends
- Financial Priorities
- Goals
- Net Worth
- Income
- Expenses & Taxes
- Savings & Contributions
- Asset Allocation
- Protection
- Observations & Next Steps**

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

The screenshot shows a modal window titled "Add Next Step" with a close button (X) in the top right. Inside the window, there is a "Type" dropdown menu currently displaying "Current Financials". Below the dropdown, a blue "Next" button is highlighted with a red circle. Above the modal, a blue "Add" button with a dropdown arrow is visible.

11. You will see a list of available Next Step templated messages. Choose 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.

The screenshot shows the "Add Next Step" dialog box in more detail. On the left is a scrollable list of templated messages. The selected message is: "{{Client}} should contact appropriate department at work and increase...". On the right, there are configuration fields: a "Message" text area containing the selected template, a "Due Date" field set to "6/28/2016", an "Assigned To" dropdown menu set to "Test and Sample Client" (circled in red), a checked checkbox for "Show this task on the client website", and a "Dynamic Text" dropdown set to "Client" with a plus sign button. A blue "Save" button is at the bottom right.

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

Assigned To

Test and Sample Client ▼

Show this task on the client website

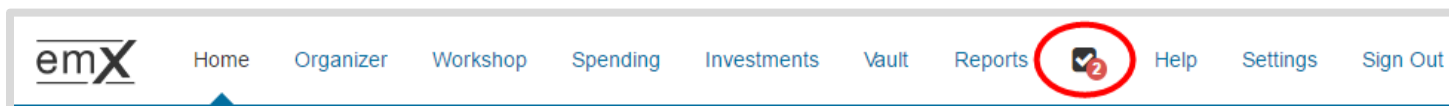
Dynamic Text

Client ▼ +

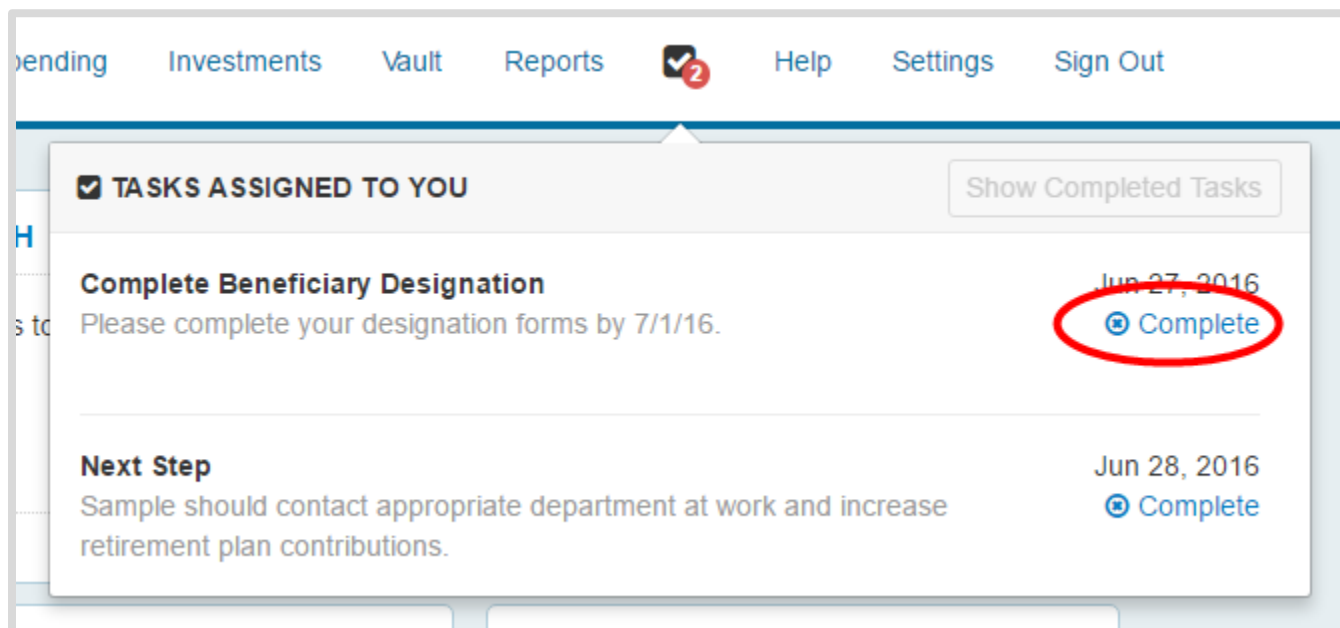
Save

Client Experience

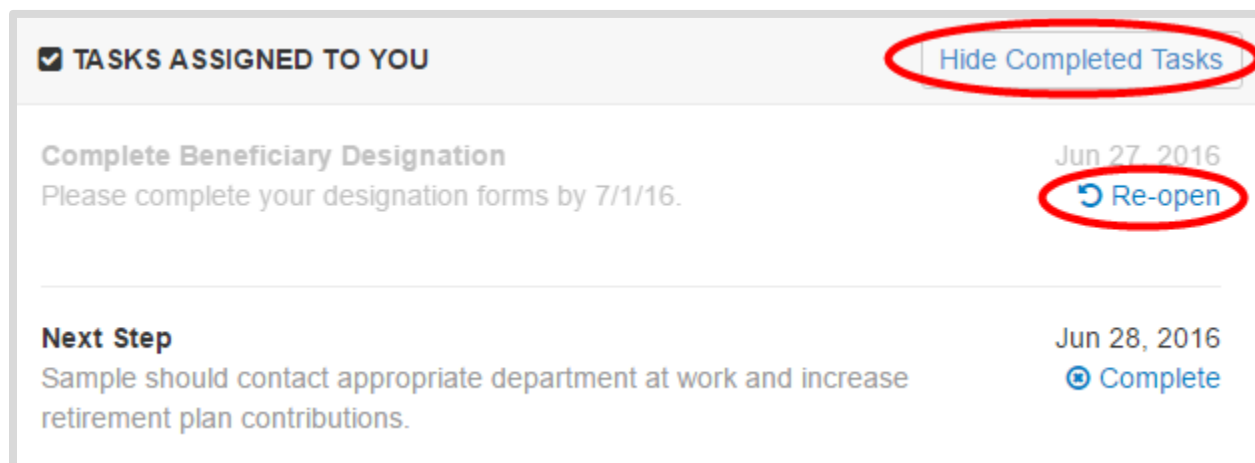
1. Assigned action items, Tasks or Next Steps, will appear from the **Tasks** icon in the client's navigation bar.



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.

The screenshot shows the 'Test and Sample Client' page with navigation tabs: OVERVIEW, FACTS, PLANS, REPORTS, VAULT, and a user profile icon. The 'Relationship' section has a left-hand menu with 'Tasks', 'Notes', and 'History'. The 'Tasks' menu is active, showing a dropdown for 'Open and Completed Tasks' (circled in red) with options: 'Open and Completed Tasks', 'Open Tasks', and 'Completed Tasks'. A table of tasks is visible below, with columns for 'Assigned To', 'Requested By', and 'Due Date'. One task is listed with 'Assigned To' as 'Client, Test and Sample', 'Requested By' as 'Pou, Hannah', and 'Due Date' as '6/27/2016'.

Assigned To	Requested By	Due Date
Client, Test and Sample	Pou, Hannah	6/27/2016