



To-Do Lists User Guide



Creating and managing To-Do Lists for you and your staff

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Overview


The To-Do List allows you create and manage a list of To-Dos for you and your staff. After a To-Do List is created, To-Dos can be self-assigned or assigned to employees, vendors, or external users. As To-Dos are completed, assignees can update their status and provide all users with visibility into their progress.

This section describes the process of creating, managing, and sharing To-Do Lists.

Creating a To Do List

To Do Lists can be created to provide a simple self-reminder or manage a list of action items for multiple individuals. This section describes the process of creating a To-Do List.

To create a To-Do List:

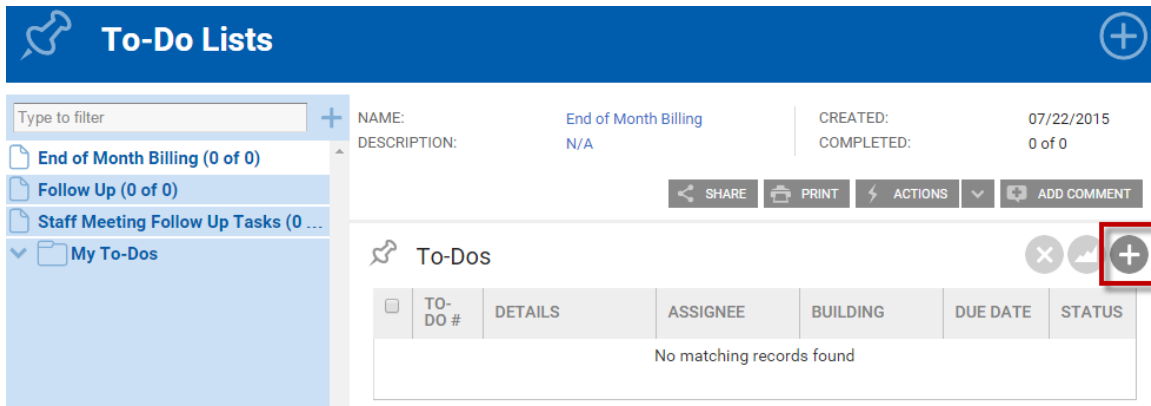
1. Click **Go To → Tasks → To-Do Lists**.
2. Click .
3. Provide a **NAME** and an optional **DESCRIPTION** of the To-Do List.
4. Click **SAVE**.

Creating a To-Do

After the To-Do List has been created you can create and assign individual To-Dos for yourself or others. This sections describes how to create a To-Do, or action item.

To create a To-Do for your To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Click the **(+) New To-Do** icon.



The screenshot shows the 'To-Do Lists' interface. The top navigation bar is blue with the text 'To-Do Lists' and a plus icon. Below this is a search bar with the placeholder 'Type to filter'. A list of To-Do Lists is displayed on the left, including 'End of Month Billing (0 of 0)', 'Follow Up (0 of 0)', 'Staff Meeting Follow Up Tasks (0 ...)', and 'My To-Dos'. The 'End of Month Billing' list is selected, showing details: NAME: End of Month Billing, DESCRIPTION: N/A, CREATED: 07/22/2015, COMPLETED: 0 of 0. Below the details are buttons for SHARE, PRINT, ACTIONS, and ADD COMMENT. A 'To-Dos' section is visible with a table header: TO-DO #, DETAILS, ASSIGNEE, BUILDING, DUE DATE, STATUS. The table is empty with the message 'No matching records found'. A plus icon in the top right of the To-Dos section is highlighted with a red box.

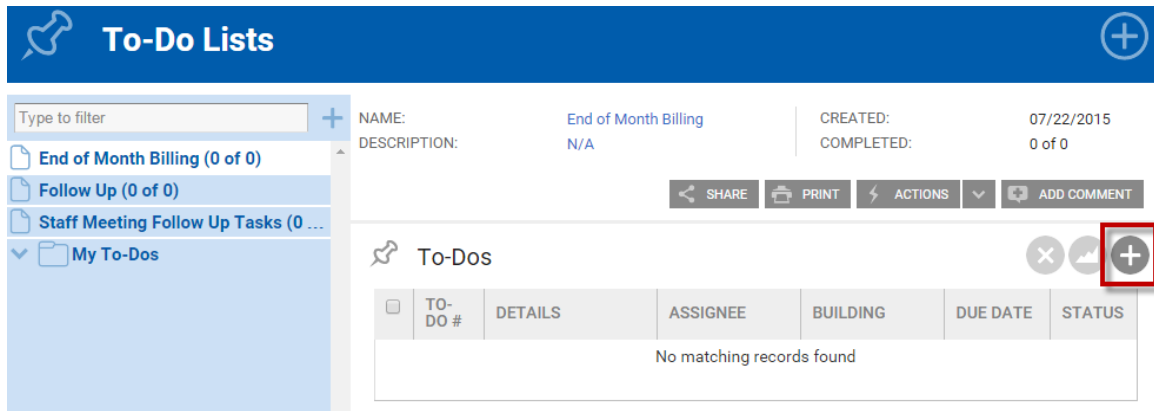
4. Select a **BUILDING** and **ASSIGNEE**.
5. Enter the **DETAILS** of the To-Do.
6. (Optional) Use the calendar icon to enter a **DUE DATE**.
7. (Optional) Click **Notify via email** to send an email notification to the To-Do assignee.
8. Click **SAVE** or **SAVE AND ADD ANOTHER** to create another To-Do.

Creating a To Do for a Non-System User

To Dos can be assigned to individuals outside the Building Engines application. When a To-Do for a non-system user is created an alert can be configured to notify the assignee. After the To-Do is completed, the non-system user can respond to the email notification and let the list owner know that the To-Do can be marked as complete. This section describes the process of creating an action item for a non-system user.

To create an action item for a non-system user:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Click the **(+) New To-Do** icon.



4. Select a **BUILDING** and enter the To-Do **DETAILS**.

- Using the **ASSIGN TO** field, select **Non-System User**, and then enter the assignee's **NAME** and **EMAIL** address.

New To-Do

TO-DO LIST
Staff Meeting Follow Up Tasks

BUILDING
Berkshire Crossing

ASSIGN TO
Non-System User

NAME
Bob Smith

EMAIL
bob@gmail.com

DUE DATE

Notify via email

DETAILS

Characters (including HTML): 0 (Limit: 4000)

SAVE **SAVE AND ADD ANOTHER** **CANCEL**


- (Optional) Use the calendar icon to enter a **DUE DATE**.
- (Optional) Click **Notify via email** to send an email notification to the action item assignee.
- Click **SAVE** or **SAVE AND ADD ANOTHER** to create another action item.

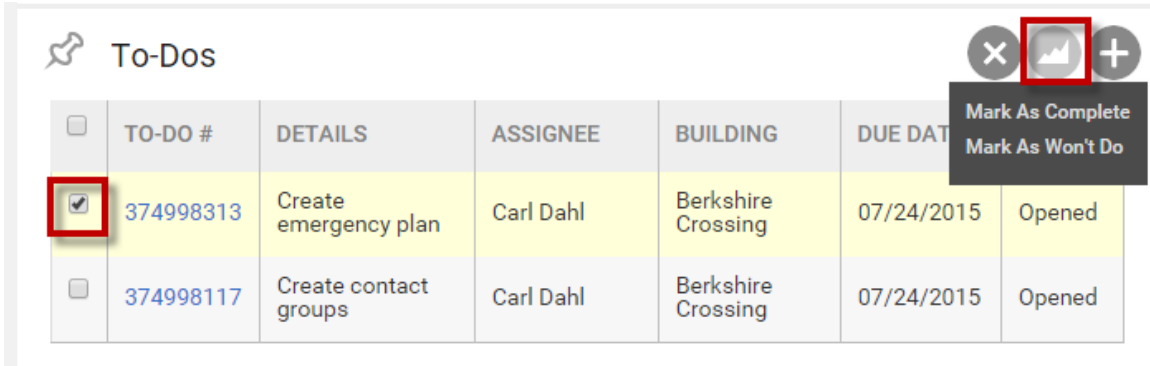
Completing a To-Do

After a To-Do has been completed you can update the To-Do to display as completed. This section describes the process of completing a To-Do.

To complete a To-Do:

- Click **Go To → Tasks → To-Do Lists**.
- Select a To Do List from the left side.

3. Check the box located next to the completed To-Do, click the  icon, and select **Mark As Complete**.




<input type="checkbox"/>	TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	
<input checked="" type="checkbox"/>	374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Opened
<input type="checkbox"/>	374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

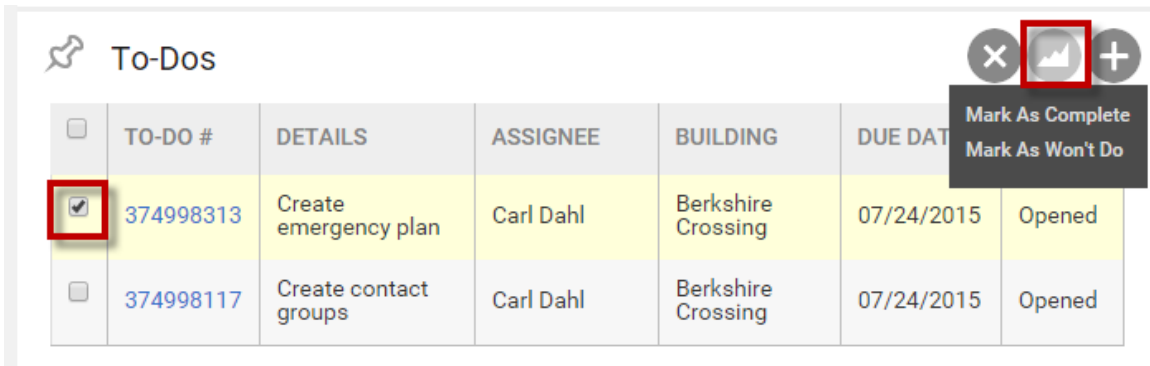
4. Confirm by clicking **YES**.

Marking a To-Do as Won't Do

If you choose not to complete a particular To-Do, however, want it to remain on your To-Do List you can mark the To-Do as Won't Do. This section describes the process of marking a To-Do as Won't Do.

To mark a To-Do as Won't Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Check the box located next to the To-Do you are not going to do, click the  icon, and select **Mark As Won't Do**.



<input type="checkbox"/>	TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	
<input checked="" type="checkbox"/>	374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Opened
<input type="checkbox"/>	374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

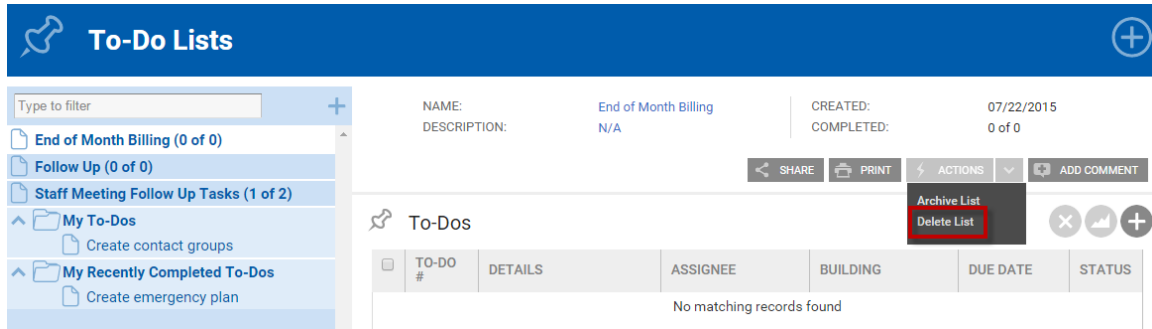
4. Confirm by clicking **YES**.

Deleting a To-Do List

This section describes the process of deleting a To-Do List.

To delete a To-Do List:


1. Click **Go To → Tasks → To-Do Lists**.
2. Select the To-Do List you want to delete.
3. Click **ACTIONS**, and select **Delete List**.

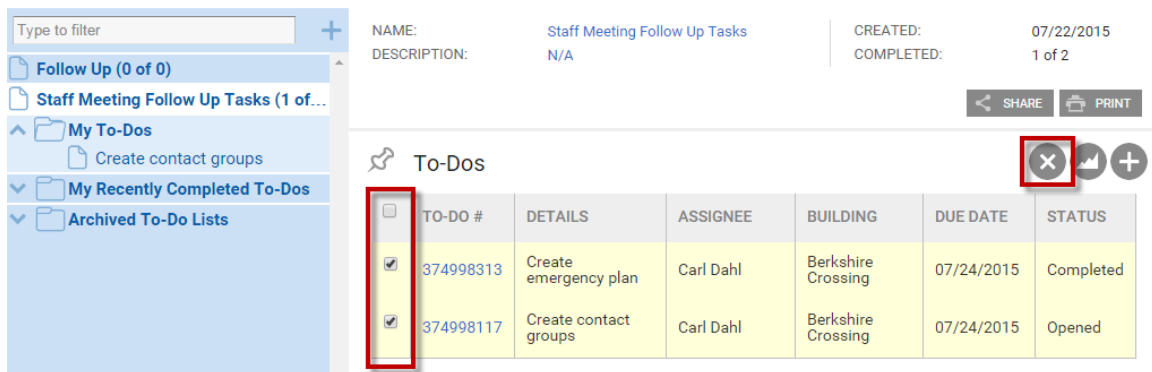


Deleting a To-Do

This section describes the process of deleting a To-Do from a To-Do List.

To delete a To-Do:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select a To Do List from the left side.
3. Check the box located next to the To-Do(s) you want to delete, and click the  icon.



4. Confirm by clicking **YES**.

Archiving a To-Do List

After all of the To-Dos on your list have been completed you can archive the To-Do List into the Archive To-Do Lists folder. This section describes the process of archiving a To-Do List.

To archive a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Select the To-Do List you want to archive.
3. Click **ACTIONS** and select **Archive List**.

The screenshot shows the 'To-Do Lists' interface. On the left is a navigation pane with folders like 'End of Month Billing (0 of 0)', 'Follow Up (0 of 0)', 'Staff Meeting Follow Up Tasks (1 of 2)', 'My To-Dos', and 'My Recently Completed To-Dos'. The main area displays details for a To-Do List: 'End of Month Billing' with a description of 'N/A', created on '07/22/2015', and 0 of 0 completed. An 'ACTIONS' dropdown menu is open, showing 'Archive List' and 'Delete List' options. The 'Archive List' option is highlighted with a red box. Below the details is a table with columns: TO-DO #, DETAILS, ASSIGNEE, BUILDING, DUE DATE, and STATUS. The table currently shows 'No matching records found'.

4. Click **YES** to confirm.

Sharing a To-Do List

To-Do Lists can be shared with system users and non-system users. The PDF To-Do List attachment includes all of the individual To-Dos, current status, and their due dates. This section describes how to share a To-Do List.

To share a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click the To-Do List you want to share.
3. Click **SHARE**.

The screenshot shows the 'To-Do Lists' interface for a list named 'Staff Meeting Follow Up Tasks' with a description of 'N/A', created on '07/22/2015', and 1 of 2 completed. An 'ACTIONS' dropdown menu is open, showing 'SHARE' and 'PRINT' options. The 'SHARE' option is highlighted with a red box. Below the details is a table with columns: TO-DO #, DETAILS, ASSIGNEE, BUILDING, DUE DATE, and STATUS. The table contains two rows of data:

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Completed
374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened

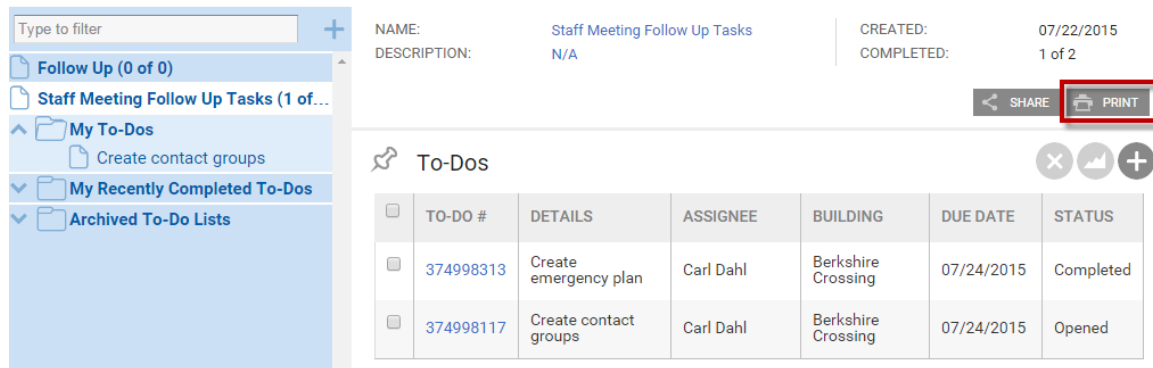
4. (Optional) The **SUBJECT**, **MESSAGE**, and **SENDER ALIAS** fields can be edited by clicking within the field and entering custom information.
5. Use the recipient builder to select your recipients.
6. Click **SEND**.

Printing a To-Do List

This section describes the process of printing a To-Do List.

To print a To-Do List:

1. Click **Go To → Tasks → To-Do Lists**.
2. Click the To-Do List you want to print.
3. Click **PRINT**.



The screenshot shows the 'To-Dos' interface. On the left is a navigation pane with a search bar and folders: 'Follow Up (0 of 0)', 'Staff Meeting Follow Up Tasks (1 of ...)', 'My To-Dos' (containing 'Create contact groups'), 'My Recently Completed To-Dos', and 'Archived To-Do Lists'. The main area displays details for the selected list: 'NAME: Staff Meeting Follow Up Tasks', 'DESCRIPTION: N/A', 'CREATED: 07/22/2015', and 'COMPLETED: 1 of 2'. Below this is a 'To-Dos' table with columns: TO-DO #, DETAILS, ASSIGNEE, BUILDING, DUE DATE, and STATUS. A 'PRINT' button is highlighted with a red box in the top right corner of the interface.

TO-DO #	DETAILS	ASSIGNEE	BUILDING	DUE DATE	STATUS
374998313	Create emergency plan	Carl Dahl	Berkshire Crossing	07/24/2015	Completed
374998117	Create contact groups	Carl Dahl	Berkshire Crossing	07/24/2015	Opened