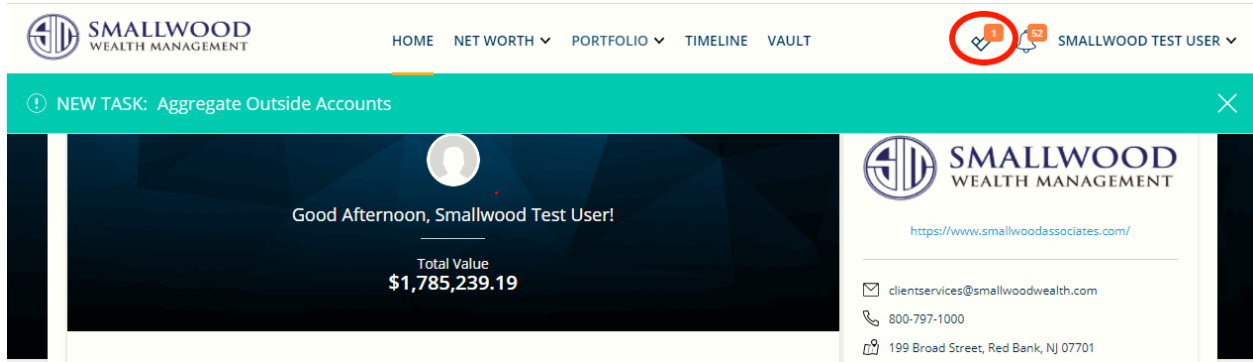


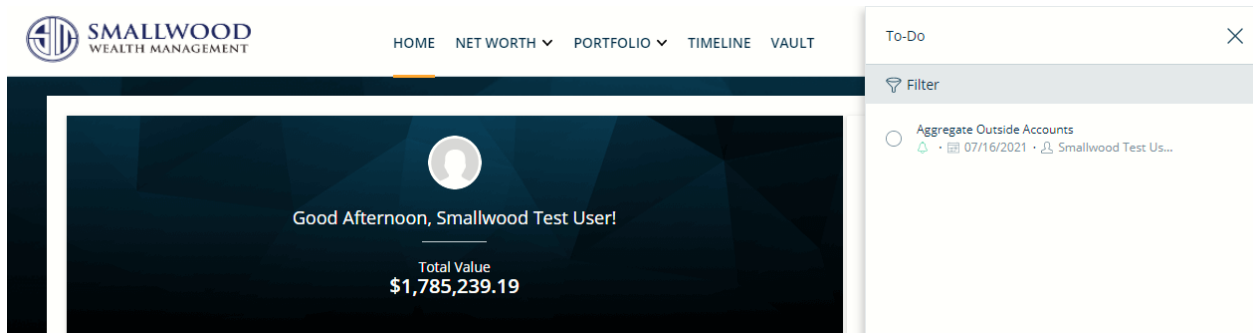


How to Use Your To-Do List

1. Once you log into your client portal, you will see a banner across the top of your screen if there is a new task. You can either click on the banner to go directly to the task or the checkmark in the top right corner to see the list of tasks assigned to you.








2. If you choose to go to the checkmark, it will bring up the list of open and completed tasks, along with the due date and who the task is assigned to.



3. Once you click into a task, you will be able to see its details, starting with *Status*. You can acknowledge that you are working on a task by selecting “*In Progress*,” or let us know that it is done by selecting “*Completed*.” There is also a comments section that you can use to communicate with us on the task.

Aggregate Outside Accounts ✕

Update ∨

 STATUS  DATES  PEOPLE  FILE  DETAILS

Status


New In Progress Completed

Comment

Add comment...optional

History ∨

July 15th, 2021






 Task - New
4:13 PM · John Smallwood

"Please navigate to the Net Worth tab, then the Accounts subtab to begin aggregating your outside accounts, such as bank accounts, credit cards, mortgage, investments, and more! I have attached the step-by-step instructions for additional help. As always, feel free to reach out to us for assistance, either by email, phone, or right here in the To-Do List!"

4. The next section is “*Dates*,” which shows you when the task is due, as well as when you will receive reminders about your outstanding task through an email.


Aggregate Outside Accounts ✕

Update ▼

 **STATUS**  **DATES**  **PEOPLE**  **FILE**  **DETAILS**

Due Date

Custom ▼

 07/16/2021

Tasks are due at 5pm EST

Reminders

None ▼

Reminder notifications are sent at 9am EST

[+ Add](#)

Comment

Add comment...optional

5. On the “*People*” section, you can see who has been assigned to the task, and who will be notified of any changes are made to the task.

Aggregate Outside Accounts ✕

Update ▾

STATUS DATES PEOPLE FILE DETAILS

Assignee
 Relationship Member Relationship

Assignees
[Redacted]
Smallwood Test User Advanced






Watcher
[Redacted]
John Smallwood

Comment
Add comment...optional



6. In the “Files” section, you can see any files the Smallwood Wealth team have uploaded related to the task, such as step-by-step instructions on how to use the portal. You can also upload files for our viewing to this task, by dragging and dropping the file into this section, or clicking “Browse” to go through your *File Explorer*.

Aggregate Outside Accounts ✕

Update ▾

 STATUS  DATES  PEOPLE  FILE  DETAILS

Files

[Aggregating Outside Accounts in Black Diamond Step-by-Step Instructions.pdf](#)  

Drag and drop files in this panel or [Browse](#) to upload

Comment

Add comment...optional

7. Once a task is done, please change its status to “Completed” and click “Update” in the bottom right corner.

Aggregate Outside Accounts ✕

Update ▾

STATUS DATES PEOPLE FILE DETAILS

Status


New In Progress Completed

Comment

Add comment...optional

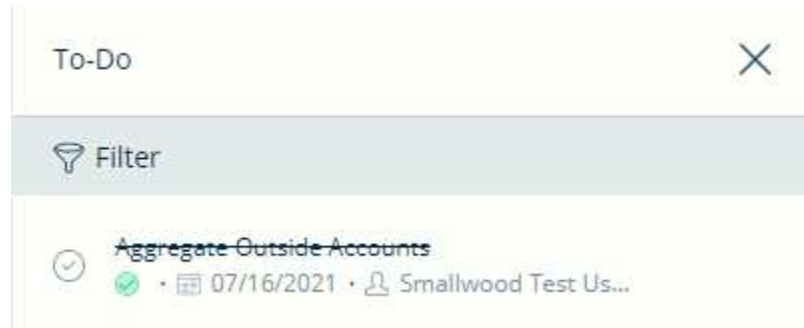
History ▾

July 15th, 2021

 Task - New
4:13 PM · John Smallwood
"Please navigate to the Net Worth tab, then the Accounts subtab to begin aggregating your outside accounts, such as bank accounts, credit cards, mortgage, investments, and more! I have attached the step-by-step instructions for additional help. As always, feel free to reach out to us for assistance, either by email, phone, or right here in the To-Do List!"

Send Notification Cancel Update

8. Once completed, it will remain on the list, but it will show up as crossed out, so you know it is done. Our team will be automatically notified that you have completed it.



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