Creating and Editing To-Do's

Last Modified on 01/07/2020 2:43 pm EST

You can assign Collections to users as **To-Do’s**, which will show up in their **To-Do** area. Creating To-Do’s provides several benefits:

Tracking completion progress on assigned materials.
Notifications to remind users to complete their To-Do's.
Spacing and sequencing content for a training or class.

NOTE: Only Collections can be made into To-Do's. If you wish to assign a single file or Pak, create a Collection for it before assigning it.

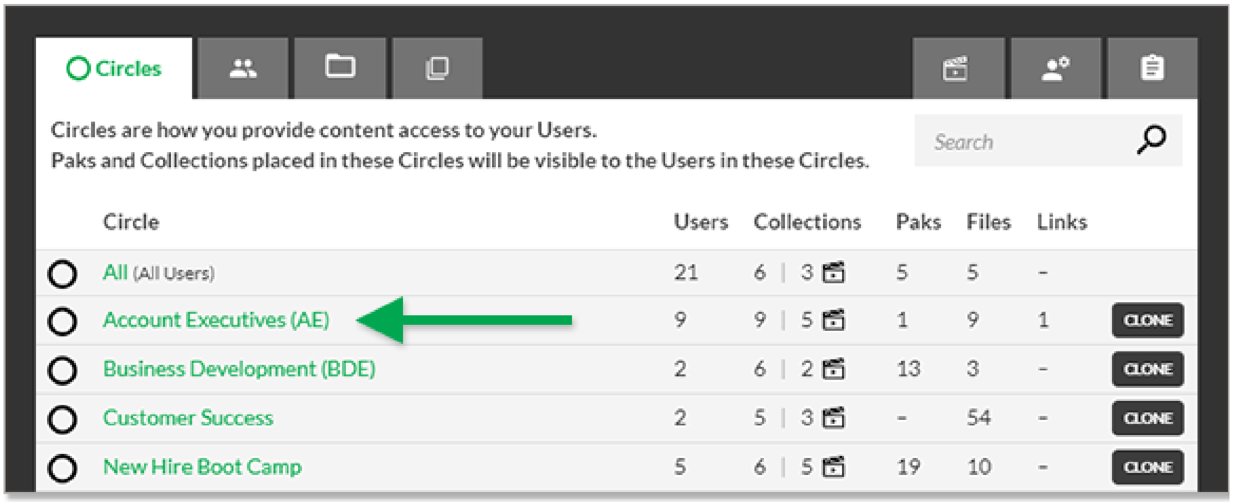
To Do Use Case Examples

Product launch training
New sales promotions
Post-classroom reinforcement training
Onboarding

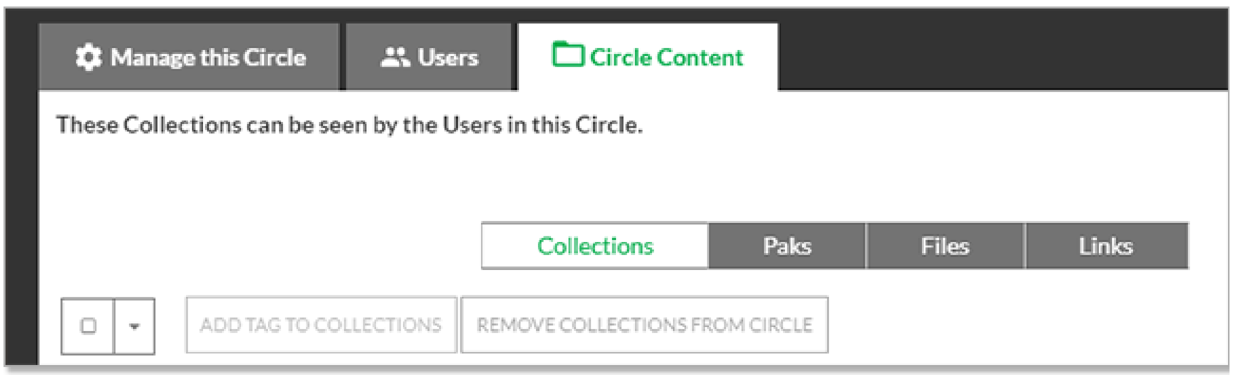
PRO TIP: Have a class, but not sure which users need to be added to it? Let your users sign up for the class themselves. Email support@veeloinc.com and ask for a **class code**, which your users can use to sign up for a class themselves. Simply let us know which **Circle** you would like the users to be automatically added to, and what you would like the class code to be (optional--we'll provide one for you automatically if you don't specify), and we'll get back to you ASAP. Once you have the class code, you can provide it to your users and direct them to sign up for the class at http://[yourcustomdomain].veeloapp.com/users/signup/.

Step by Step

1. Go to the **Circles** tab. Select the Circle with the users for whom you wish the create the To-Do, or create a new one.

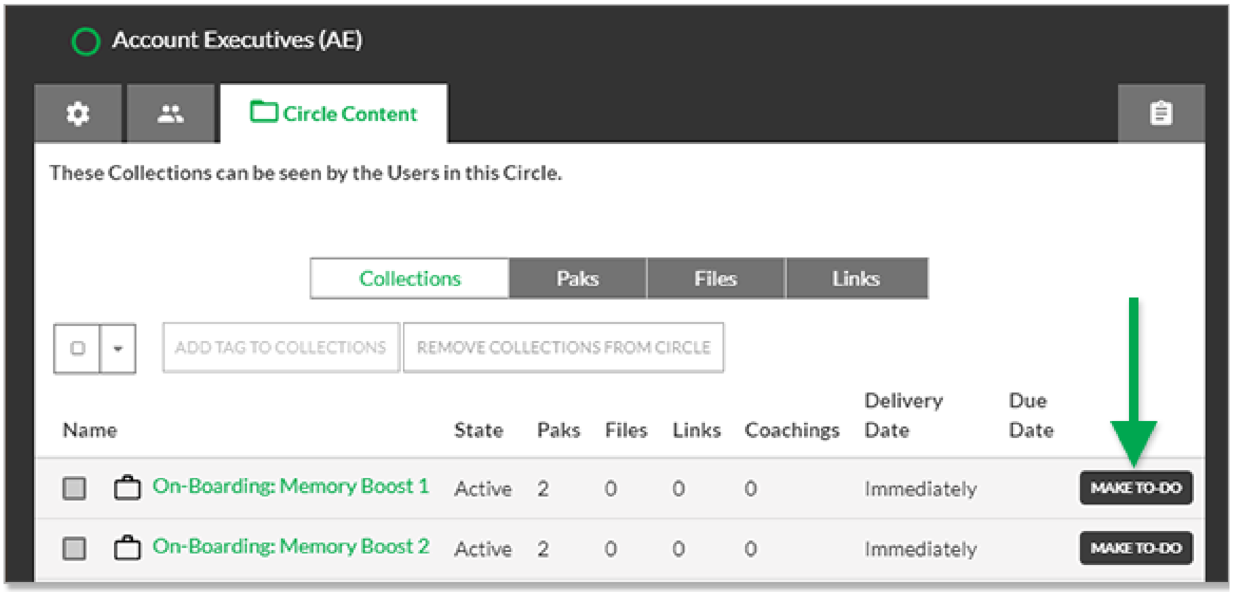


2. Once inside the Circle, click on **Circle Content** and then select **Collections.**

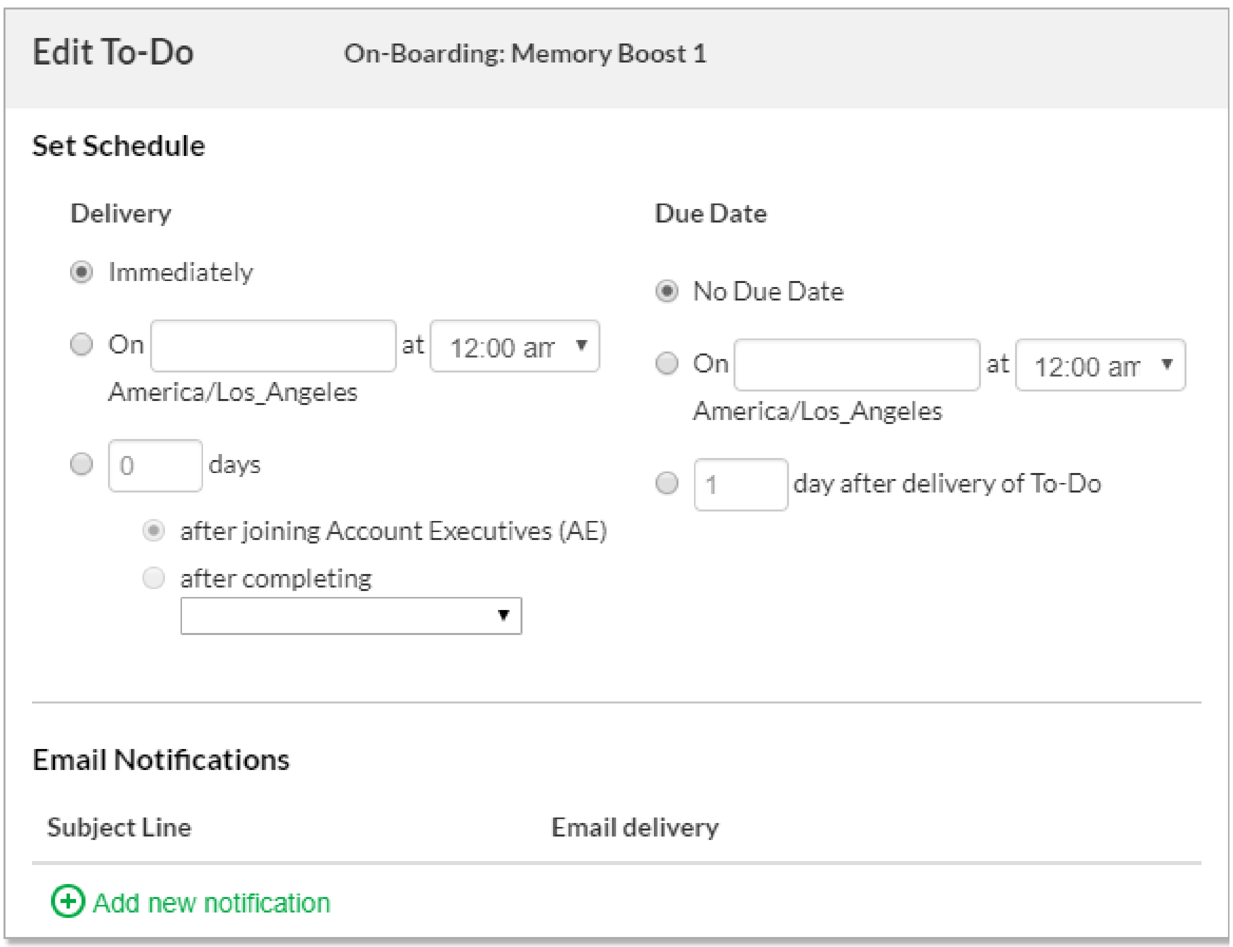


3. If you haven't added the Collection(s) yet, click on the **Add Collections** button, and select the Collection(s) you wish to add.

4. To turn a Collection into a To-Do, click on the **Make To-Do** button.



5. You'll be shown the **Edit To-Do** screen. From here, you can:



6. a. **Set your To-Do delivery date.** You can choose to have the To-Do available:
   (i) Immediately

(ii) On a specific calendar date
(iii) After a certain number of days after the user has first gained access to the content
(iv) After the user has completed a particular Collection

To-Do's available immediately are immediately viewable by the user. To-Do's with scheduled delivery dates will not show for the user until the specified date, until the specified interval has passed, or until they have satisfied the Collection viewing requirement you've set.

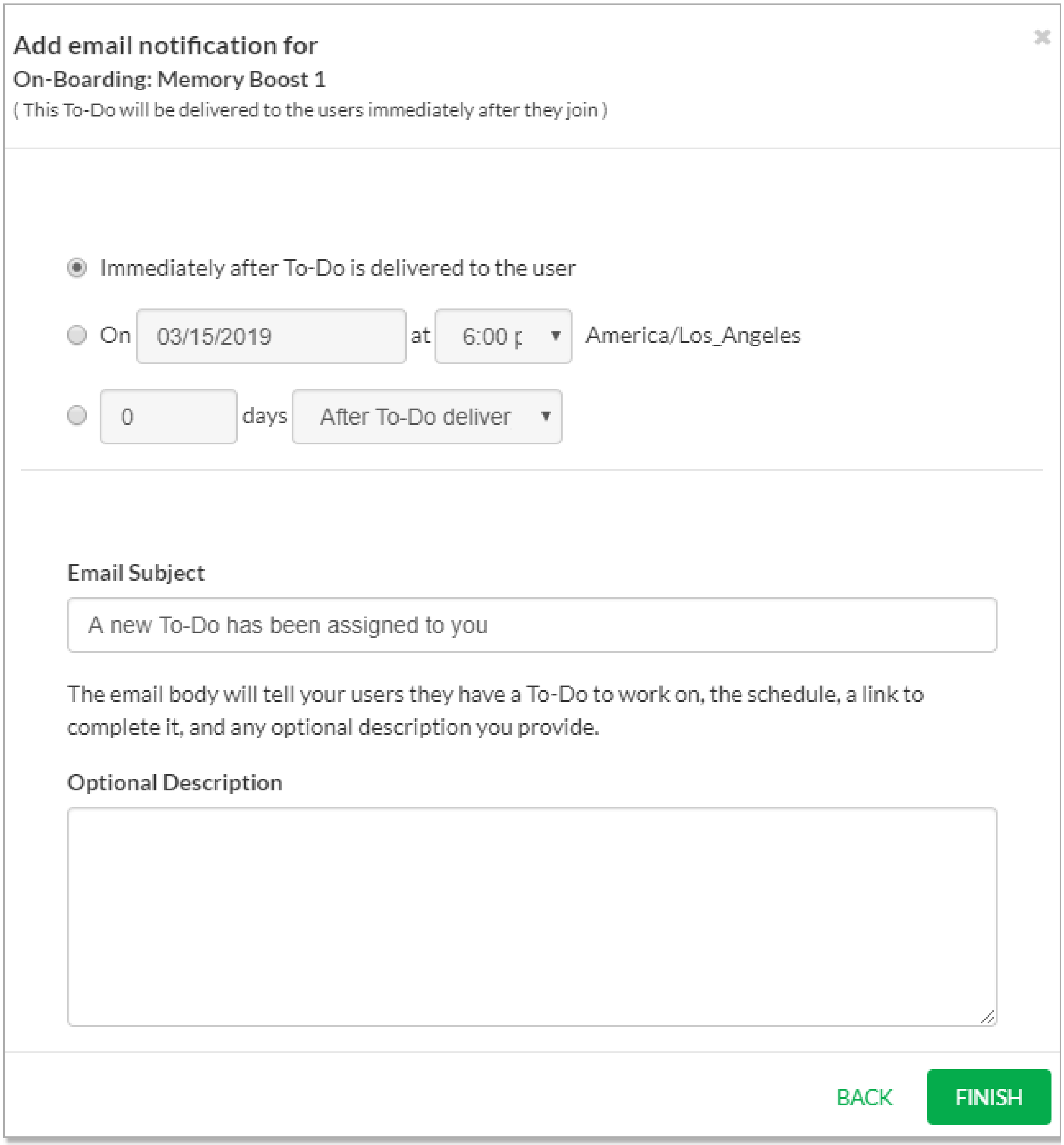
b. **Set your To-Do due date.** You can choose no due date, or to set a specific date on the calendar, or a number of days after the delivery of the To-Do.

If you have a set cohort of users for this To-Do who will all be completing the training at the same time, using the specific calendar date will be best.

If, on the other hand, this To-Do will be delivered to a rotating cast of users who will join the Circle at different times, choosing a due date based on the To-Do delivery will work better.

7. Click on the **Add New Notifications** link to create a notification for this To-Do.

   NOTE: Failing to set notifications will mean your users will not be notified that they have a To-Do.



8. Notification delivery options include:

   a. **Immediately after To-Do is delivered to the user:** Your users will receive a notification shortly after you save your To-Do settings.

   b. **On a specific calendar date**: Your users receive the notification within one hour of the specified date and time, based on the time zone of your Circle.

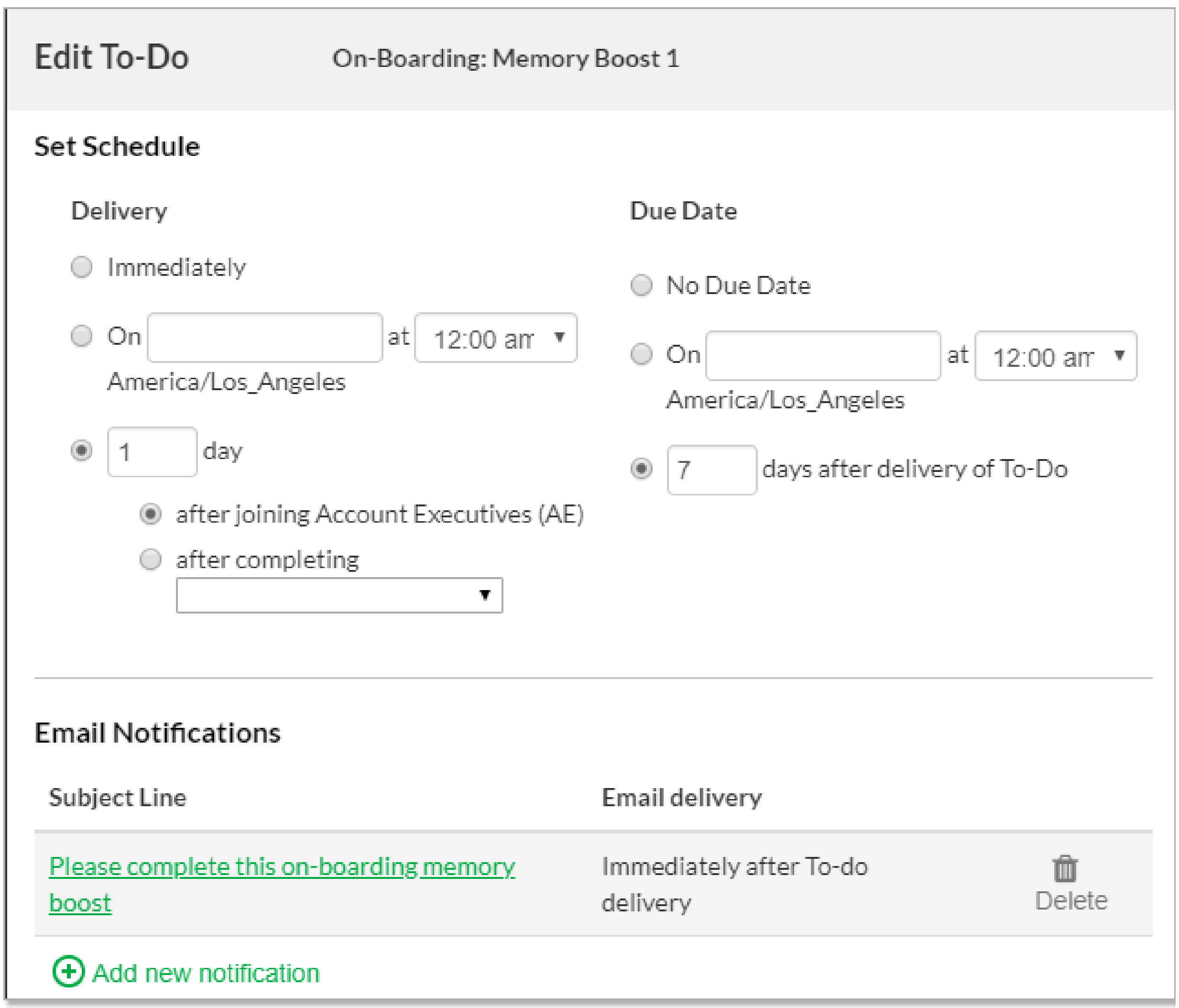
   c. **A certain number of days:**

(i) After the To-Do delivery
(ii) Before the Due Date (if applicable)
(iii) After the Due Date (if applicable)

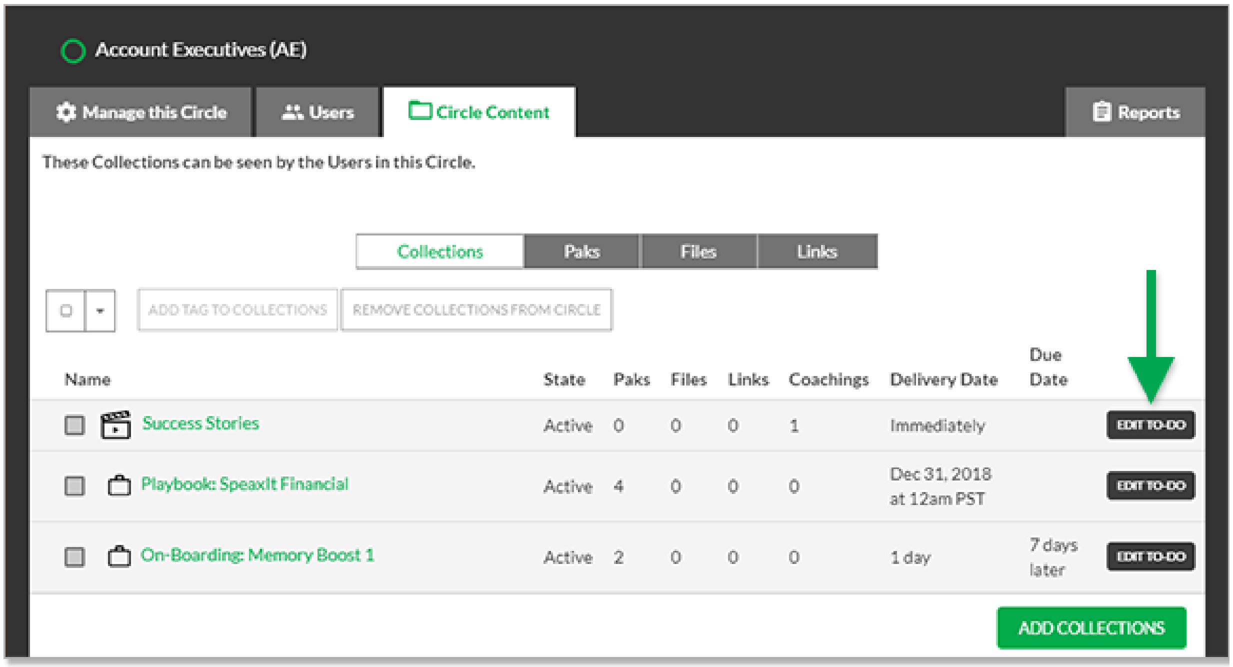
Customize the notification subject line and text. Your users will receive the email with a link to the To-Do after you finish editing your To-Do settings.

9. Add additional notifications as necessary by clicking on the **Add New Notifications** link.

10. Click the **Save** button when done.



11. To edit your To-Do's, click on the **Edit To-Do** button.


Account Executives (AE)
Manage this Circle
Users
Circle Content
Reports
These Collections can be seen by the Users in this Circle.
Collections
Paks
Files
Links
ADD TAG TO COLLECTIONS
REMOVE COLLECTIONS FROM CIRCLE
Name
State
Paks
Files
Links
Coachings
Delivery Date
Due Date
Success Stories
Active
0
0
0
1
Immediately
EDIT TO-DO
Playbook: SpeakIt Financial
Active
4
0
0
0
Dec 31, 2018 at 12am PST
EDIT TO-DO
On-Boarding: Memory Boost 1
Active
2
0
0
0
1 day
7 days later
EDIT TO-DO
ADD COLLECTIONS