How to respond to a "To-do" in Canopy

7 Steps <u>View most recent version</u>

Creation Date September 1, 2023 Last Updated September 1, 2023

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Click on To-do

Prims	To-do
	C Q's Due Aug 31, 2023
Home To-do	E 8.23 Inventory Due Sep 08, 2023
Files	B.23 Questions Due Sep 08, 2023
Billing	Recent Files
Schedule an appointment	Joe B W4 2023.pdf Aug 31, 2023
	i-9.pdf

STEP 2

Click on the To-do you would like to address

To-do			Overdue
Ē	Q's Due Aug 31, 2023		
Ē	8.23 Inventory Due Sep 08, 2023		New
Ē	8.23 Questions Due Sep 08, 2023		New
		View completed tasks	

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To respond, click on "Add a comment..."

Once comment is entered, click Send then "Mark as Complete" ***It is very important that you "Mark as Complete" otherwise Prime Numbers is not notified that you have responded***

< Back	8.23 Inventory	
E 8.23 Inver	mber 8, 2023	
1. What is you	r inventory totals as of 8.31.23?	
Sent by Aman	da Lynnes on Sep 1, 2023	
		×
Add a cor	nment	🕅 Send
	Mark as complet	te

STEP 4

Click on "Back" to do view other open To-do's

Back Back Back	
Ompleted September 1, 2023	
1. What is your inventory totals as of 8.31.23? Sent by Amanda Lynnes on Sep 1, 2023	Sep 1, 2023 at 10:09 am \$50.00
Add a comment	Send
Mark as incomplete	



Responding to second open To-do, repeat step 3

To-do	
Ē	Q's Due Aug 31, 2023
Ē	New 8.23 Questions Dire Son 98, 2023 8.23 Questions
	Hide completed tasks
\oslash	In Review 8 .23 Inventory Completed Sep 01, 2023
\odot	ABC July Open Items 1 Completed Sep 01, 2023 🖻

STEP 6

Click on "Back" to get to main screen

< Back 8.23 Question	15
O 8-23 Questions Completed September 1, 2023	
2. What is your first pet's name? Sent by Amanda Lynnes on Sep 1, 2023	Sep 1, 2023 at 10:10 am Goldie
Add a comment	() Send
Mark as income of the second secon	nplete

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Now all of your tasks have been completed!

Prima	To-do
Home	
To-do	All of your tasks have been completed
Files	Hide completed tasks
B Billing	la Revie
Schedule an appointment	Completed Sep 01, 2023
	In Paule

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