 Slipstream financial services	Energy Finance Solutions VelocityGO Procedures Task Processing	Procedure #	101.01
		Revision #	1.0
Role	Contractor	Implementation Date	4.11.2022
		Approved By:	

A. Purpose

The purpose of this procedure is to describe the steps involved with communications within in the VelocityGO system.

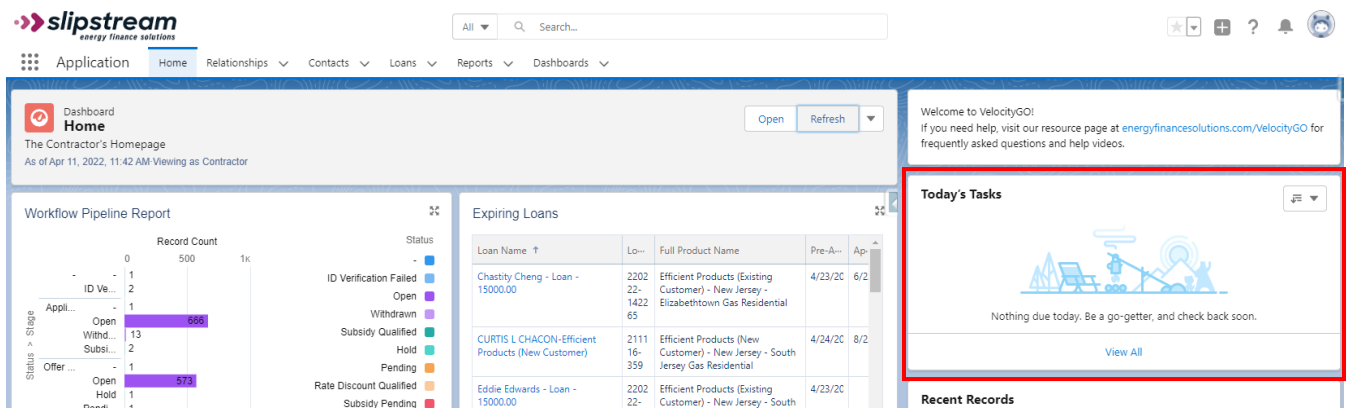
B. Scope

This is core functionality and is used in several procedures.

C. Procedure

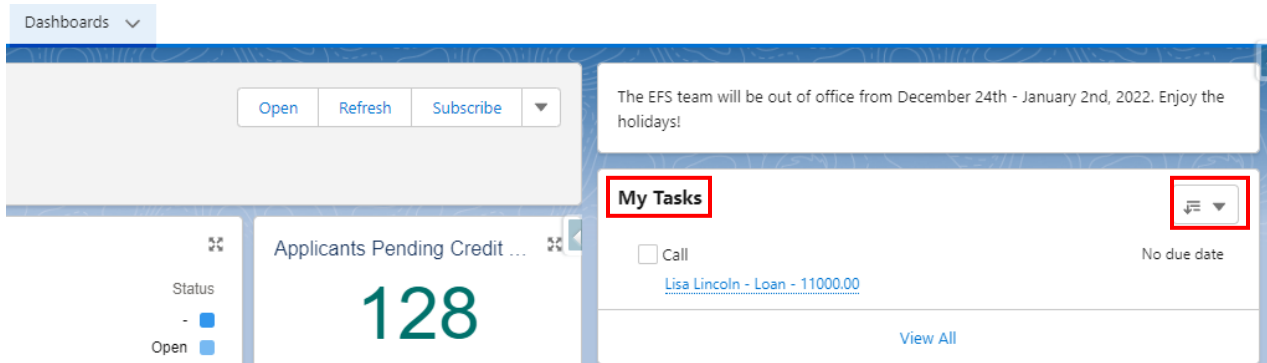
Processing a Task

1. Review the Tasks section on the Home Page.



The screenshot shows the VelocityGO Home Page dashboard. The 'Today's Tasks' section is highlighted with a red box. It contains the following text: 'Welcome to VelocityGO! If you need help, visit our resource page at energyfinesolutions.com/VelocityGO for frequently asked questions and help videos.' Below this is an illustration of a person working at a computer. The text reads: 'Nothing due today. Be a go-getter, and check back soon.' At the bottom of the box is a 'View All' link.

2. Click the Dropdown arrow in the upper right corner of the Tasks box. Change view from 'Today's Tasks' to 'My Tasks' to see all tasks assigned to you.



The screenshot shows the VelocityGO Home Page dashboard with the 'My Tasks' section. The 'My Tasks' title and the dropdown arrow in the top right corner of the task box are highlighted with red boxes. The task list shows a call task for 'Lisa Lincoln - Loan - 11000.00' with 'No due date'. A 'View All' link is at the bottom of the task box.

3. Click on the name of the task to open the details.

My Tasks ⌵

Call No due date

[Lisa Lincoln - Loan - 11000.00](#)

[View All](#)

4. Review the comments section to determine what needs to be done.

Details Related

<p>Assigned To Lending Officer</p> <p>Subject Call</p> <p>Due Date</p> <p>Priority Normal</p> <p>Created By Lending Officer, 2/21/2022, 1:32 PM</p> <p>Comments Please Call customer and let them know what else they need to provide</p>	<p>Status New</p> <p>Name</p> <p>Related To Lisa Lincoln - Loan - 11000.00</p> <p>Last Modified By Lending Officer, 3/9/2022, 12:00 PM</p>
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a. If necessary, click on the hyperlink under 'Related To' to go to the Loan.

<p>Assigned To Lending Officer</p> <p>Subject Call</p> <p>Due Date</p> <p>Priority Normal</p>	<p>Status New</p> <p>Name</p> <p>Related To Lisa Lincoln - Loan - 11000.00</p>
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5. Once the item has been completed, return to the task and mark it complete by checking the button.

Task **Call** [✓ Mark Complete](#)

Name Related To
[Lisa Lincoln - Loan - 11000.00](#)

Details Related

End of Process

Revision History

Revision	Effective Date
1.0	4.11.2022