

Managing Tasks

Learn how to create and manage tasks within the Customer Relationship Management Application.

With the Tasks Section you can:

Assigns Tasks to an Employee or agent.

Outline the objectives for that Task.

Establish the Priority and Status of a Task.

List Maintenance Import Contacts

Tasks <<

- All Tasks
- By Status
- By Due Date

Tasks

- Contacts
- Leads
- Notes
- Transactions
- Reports
- Events
- Marketing Campaigns
- Proposals

+ Add New

Then select the 'Add New' button to create a new task.

Subject	Status	Priority	Due Date	Task Owner	Related Contact
Send Message to Prospect1	Scheduled	High	2/25/2010	Alex Sherman	
Test	Scheduled	Low	3/9/2010	Alex Sherman	
New Task	Scheduled	Medium	3/15/2010	Alex Sherman	
Task For April	Scheduled	High	3/27/2010	Alex Sherman	
	Scheduled	High		Alex Sherman	

Select the 'Tasks' tab.

Begin by selecting the 'Tasks' tab, then selecting the 'Add New' button to create a new task.

Task Form: Untitled

Save and Close Assign Task to Employee **Click to assign employee.** Cancel

Task Detail

Notes

Subject:

Owner: Alex Sherman

Status: Priority:

Assigned Employee Name:
E-Mail:
Phone:

Related Contact Name:
E-Mail:
Phone:

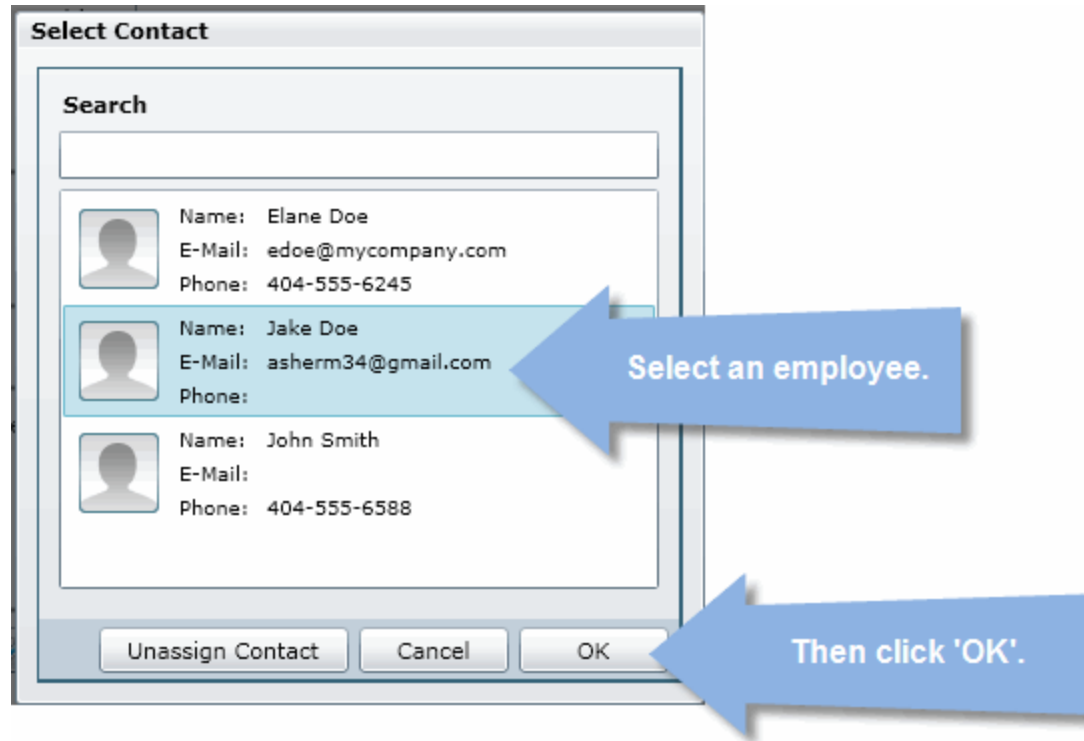
Due Date: Thursday, April 01, 2010

Description:

Invites

* Seperate email addresses with a ';'.

To begin, you may start by assigning a particular employee or agent by selecting the 'Assign Task to Employee' button as shown here.



Be sure to then select the specific employee or agent that you want the task to be assigned to, and then click 'OK' to save.

Task Form: Untitled

Save and Close Assign Task to Employee Related to Contact Delete Record Cancel

Task Detail

Notes

Subject:

Owner: Alex Sherman

Status:

Priority:

Cancelled
Completed
Planning Stage
Postponed
Scheduled

Critical
High
Medium
Low

Due Date:

Description:

Invites

* Separate email addresses with a ','.

Next, continue to fill out the task by:

- Creating a 'Subject' name.
- Selecting a 'Status'.
- Selecting a 'Priority'.

If none of the options for 'Status' or 'Priority' fit your needs, you are able to edit and add these values through the 'Admin' tab under 'Maintenance'.

Task Form: Untitled

Save and Close Assign Task to Employee Related to Contact Delete Record Cancel

Task Detail

Subject: New Task

Owner: Alex Sherman

Status: Scheduled Priority: Medium

Assigned Employee Name: Jake Doe E-Mail: asherm34@gmail.com Phone: Related Contact Name: E-Mail: Phone:

Due Date: Thursday, April 01, 2010

Description:

Invites

* Separate email addresses with a ';'.

Next be sure to select a due date for the task. You may also add a description if necessary in the area shown, to help explain any additional details associated with the task that you would want the employee to know about.

Task Form: Untitled

Save and Close Assign Task to Employee Related to Contact Delete Record Cancel

Task Detail

Notes

Subject: New Task

Owner: Alex Sherman

Status: Scheduled Priority: Medium

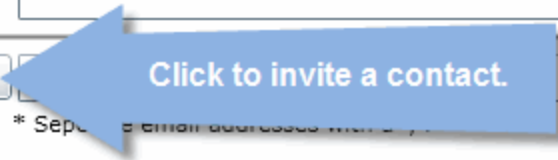
Assigned Employee Name: Jake Doe E-Mail: asherm34@gmail.com Phone: Related Contact Name: E-Mail: Phone:

Due Date: Thursday, April 01, 2010

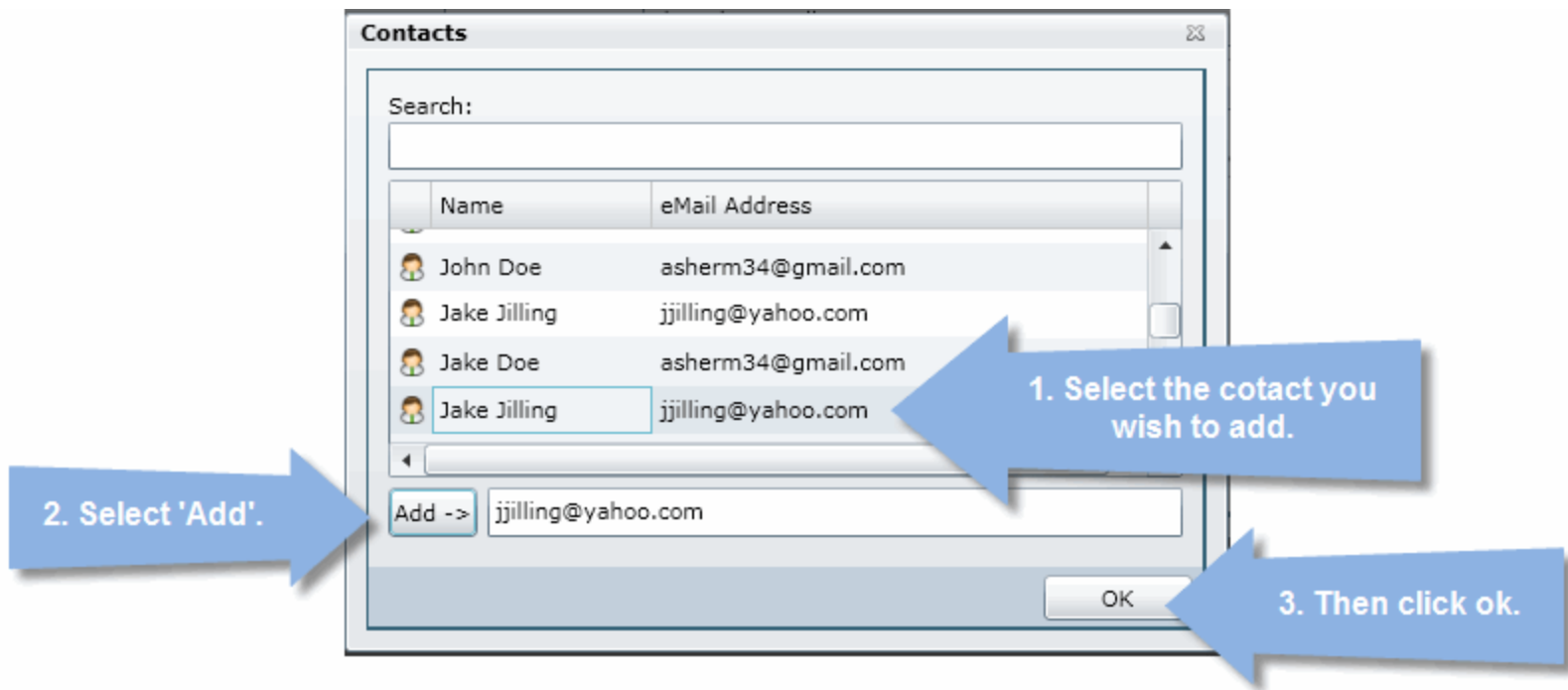
Description:

Invites

* Separate email addresses must be used for each contact.



To invite or notify other contacts of a particular task, you may select the 'Invites' button.



Once you have selected the invites button, you are able to then select a contact, choose 'Add', and click 'Ok' to save and invite the contact.

Task Form: Untitled

Save and Close Cancel

Task Detail

Notes

Subject: New Task

Owner: Alex Sherman

Status: Scheduled Priority: Medium

Assigned Employee Name: Jake Doe E-Mail: asherm34@gmail.com Phone: Related Contact Name: E-Mail: Phone:

Due Date: Thursday, April 01, 2010

Description:

Invites

* Separate email addresses with a ','.

Once you have finished filling out the information associated with the task, you may click 'Save and Close' to save the task as pictured here.

Tasks <<

- All Tasks
- By Status
- By Due Date

Tasks

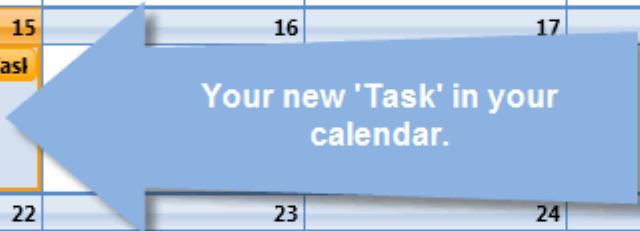
- Contacts
- Leads
- Notes
- Transactions
- Reports
- Events
- Marketing Campaigns
- Proposals

		+ Add New	Search	Action	Multi-Edit Form	Grid Columns	Total Records: 6
Subject	St						Employee
Send Message to Prospect1							
Test	Sc						
New Task	Schedule	Medium	3/15/2010	Alex Sherman			
Task For April	Scheduled	High	3/27/2010	Alex Sherman			
Task for Second Round Email blast	Scheduled	High		Alex Sherman			
New Task	Scheduled	Medium		Alex Sherman			







Your new task will appear in your 'Task' list.

Today | Day | Week | **Month**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
February	28	March 1	2	3	4	5	6
Feb28 - Mar6						5:38 PM Event: Launch E	
	7	8	9	10	11	12	13
Mar7 - Mar13			5:22 PM Task: Test				
	14	15	16	17	18	19	20
Mar14 - Mar20		9:41 PM Task: New Tasl					
	21	22	23	24	25	26	27
Mar21 - Mar27							
	28	29	30	31	April 1	2	3
Mar28 - Apr3							
	4	5	6	7	8	9	10
Apr4 - Apr10		Campaign: New Campaign					



Your new 'Task' in your calendar.

+ Add New		🔍 Search		⚙️ Action		📄 Multi-Edit Form		☰ Grid Columns		Total Records: 6	
Subject	Status	Priority	Due Date	Task Owner	Related Contact	Assigned Employee					
	<div style="border: 1px solid blue; background-color: #e6f2ff; padding: 5px; display: inline-block;"> Double Click, or select to view details. </div>										
View Details											
	Test	Scheduled	Low	3/9/2010	Alex Sherman						
	New Task	Scheduled	Medium	3/15/2010	Alex Sherman						
	Task For April	Scheduled	High	3/27/2010	Alex Sherman						
	Task for Second Round Email blast	Scheduled	High		Alex Sherman						
	New Task	Scheduled	Medium		Alex Sherman						

To add or edit any information to an existing task, you may select the 'Task' and choose 'View Details' to access and edit the task.