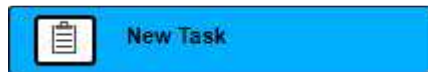


Tasks Management



or



There are 3 Types of Tasks

- Recurring
- Non-Recurring
- Birthday / Anniversary Reminders

Mandatory Fields

- Recurring & Non-Recurring Tasks

There are **4 Mandatory Fields** required for both Recurring and Non-Recurring Tasks

1. Task Subject or Description

2. Priority Level

The default priority is “Low”

3. Date

Non-Recurring Tasks

the date the Task needs to be actioned

The default date will be the current date if no future date is selected

Recurring Tasks

The 1st effective date for a Recurring Task. The default priority is “Low”

4. Assignee

A Task will by default link to the Assignee creating the Task.

The Task can be allocated to any other Assignee subject to access permissions.

Optional Fields

- Recurring & Non-Recurring Tasks

The following are optional fields available for both Recurring and Non-Recurring Tasks

- Task Tracking

Task Tracking is a History function allowing for Progress and other Comments to be added to Tasks until it is completed.

Select Tracking ^(i,1) if Tracking is required

- Warning Days
You can apply Advance Warning Days to any Task.
A Task with advanced warning days will display with a “Warning” status on the To-Do-List until the actual Due Date.
- Tasks can be linked to a Contact
- Tasks can be linked to a Task Activity
- Tasks can be created with Processing Instructions
- The System also allows for a File to be attached to the Task as an additional processing aid.

Recurring Tasks

The following is an example of a Recurring Task with Task Tracking not activated. The Task is also not of a limited duration

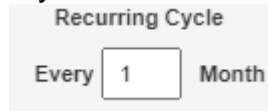
The screenshot shows a task creation form with the following fields and options:

- Title:** Update Cash Flow Forecast
- Priority:** 2 High
- Tracking:** Tracking ^(i,1)
- Recurring Options:** Recurring Options are Date dependent
- Next Due Date:** 30 October 2020
- Warning Days:** 3
- Recurring Frequency:** Monthly on the last Friday
- Recurring Cycle:** Every 1 Month
- Ends After:** Ends After 30 Repeats
- Never Ends:** Never Ends
- Contact:** Royal Mount
- Activity:** Admin
- Assignee:** Claudia
- Detail:** Use the latest Sales Forecast
- Attach File:**

Mandatory Fields for Recurring Tasks

Select the 1st Effective Date

- Open the Dropdown and select the Recurring Frequency
e.g. Monthly on the last Friday.
- You will also have to select the appropriate Recurring Cycle,
The Recurring Cycle will only display after the Recurring Frequency
selection was made
e.g. every Month

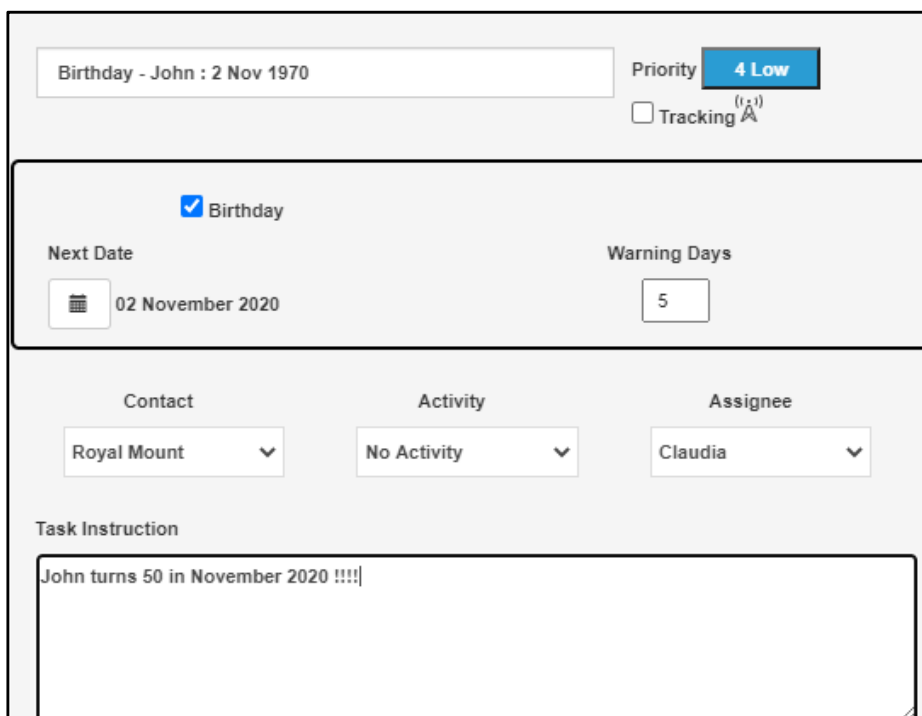


Recurring Cycle
Every 1 Month

You also have the option to limit the Recurring Cycle if the Task is of a limited duration

Birthdays

The following is an example of a Birthday Task



Birthday - John : 2 Nov 1970

Priority 4 Low

Tracking ^(1,1) A

Birthday

Next Date 02 November 2020

Warning Days 5

Contact: Royal Mount

Activity: No Activity

Assignee: Claudia

Task Instruction: John turns 50 in November 2020 !!!!

Tip

Use the Subject Field and enter the detail of the Birthday, including the year, should you know the Year, as in the example above.

Knowing the year will help you to identify the major Milestone Birthdays e.g. when John turns 50 years.

If you do not know the year then just enter "Birthday - John ". You can always edit the record in the future.