

To-Do-List

The **To-Do-List** defaults to the current date with the following columns –

- **Task**

The Task Description could be followed with some Indicators e.g.



indicate that there are Processing Instructions for the Task



indicate that it is a Recurring Task



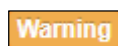
Task Tracking was activated for the Task

- **Contact** the Contact will be displayed if the Task was linked to a Contact

- **Due Date** the original Due Date of the Task is displayed

- **Activity** the Activity will display for Tasks which are linked to a Task Activity linked

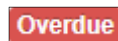
- **Status** the Status indicates the Current Status of the Task



if a Task was created with Advanced Warning



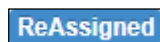
the Task is due on the Current Day



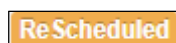
the Task is past its Due Date



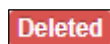
the Task was Completed



the Task was Reassigned (delegated) to another Assignee



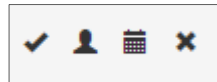
the Task was Rescheduled to a Future Date



the Task was Deleted

- **Actions**

The status of a Task is changed by activating one of the following 4 actions



Complete the Task



Reassign (delegate) the Task



Reschedule the Task to a Future Date



Delete the Task

Permission Settings will determine which Task Status changes you may perform.

The permission to Complete a Task is a default for all Assignees

- **Priority**

There are 4 Priority Levels

1 Urgent

2 High

3 Med

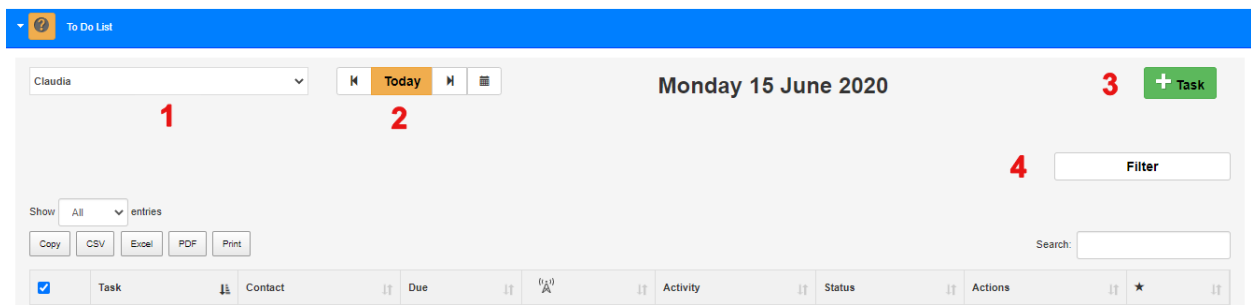
4 Low

You can sort data in any column by clicking on the Header Description of a column.



- Click on the Task Description to access the Screen where the Task was created to View History and/or Edit the Task
- Click on the Contact Name to access the Contact

Navigation on the To-Do-List Screen




1. Assignee

Use the Assignee Dropdown to access the To-Do-Lists of Assignee to whom You have access.

2. Today

Clicking the Today Button will always revert to the Current Day of your To-Do-List, irrespective of the Day or which Assignee you have viewed.

3. + Task

The  Button allows for quick access to capture New Tasks.

4. Filter

The Filter Option is hidden by default.

Activating the Filter Button will allow you filtering options of Tasks on a selected Day

2 Buttons will display after having activated "Filter"



- Activating "Hide: will hide the Filter display
- Task History will display the date a Task was created and all subsequent status changes until its completion
Select (Tick) the Task for which you want to view history and press the "Task History" button