# **Task Management**

There are 3 Types of Tasks

- Non-Recurring
- Recurring
- Birthday / Anniversary Reminder

### **All Tasks**

#### **Mandatory Fields for all Tasks**

There are 4 Mandatory Fields required for all Tasks

A Task Subject or Description

Subject

A Priority Level

There are 4 Priority levels

1 Urgent

2 High

3 Medium

4 Low

The default priority is 3 Low

Click the Button to change the priority level

A Due Date for the Task

Non-Recurring Tasks will default to the current date if no future date Is selected.

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

Year and the Task to the Assignee creating the Task.

You can allocate the Task to another Assignee subject to your access permissions..

### **Optional Fields**

The following are available options to apply to all Tasks

Task Tracking

Task Tracking is a History function which allows for Comments to be added to a Task until it is completed.

Select Tracking if required

Warning Days

You can apply Advance Warning Days to any Task
e.g. 5 days warning of an important Birthday
The Task will display on the ToDoList with a "Warning"
Status

- Tasks can be Contact linked
- Tasks can also be Activity linked
- Task Detail All Tasks can be created with Processing and any other Instructions

# **Recurring Tasks**

The following Screen will display when the Recurring option is selected



#### **Mandatory Fields for Recurring Tasks**

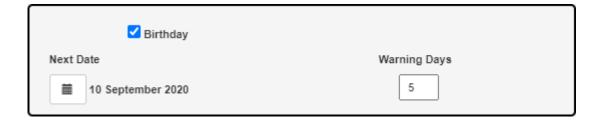
- Select the 1<sup>st</sup> Effective Date
- Open the Dropdown and select the Recurring Frequency e.g. very 2<sup>nd</sup> month; very 6 weeks etc.
- You will also have to select the appropriated Recurring Cycle, which will only display after the Recurring Frequency selection was made e.g. very 2<sup>nd</sup> month; very 6 weeks etc.



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

# **Birthdays**

The following Screen will display when the Birthday option is selected



### **Mandatory Fields for Birthdays**

• Select the Next Birthday Date of the Person



Use the Subject Field and enter the detail of the Birthday, including the year the Person was born, if 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 40 years.

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

### **Edit Tasks**

Select the Task to be edited and then the Edit Icon

