

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.
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 ^(1/1) 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

The screenshot shows a configuration window for a recurring task. At the top left, there is a checked checkbox labeled 'Recurring' and an unchecked checkbox labeled 'Birthday'. Below these, the text 'Options are Date dependent' is displayed. The 'First Effective Date' is set to '10 September 2020' with a calendar icon. To its right, 'Warning Days' is set to '0'. Under 'Recurring Frequency', a dropdown menu is open, showing 'Every Week Day (Mon-Fri)'. At the bottom, there are radio buttons for 'Never Ends' (which is selected) and 'Ends After' (with a value of '30 Repeats').

Mandatory Fields for Recurring Tasks

- Select the 1st Effective Date
- Open the Dropdown and select the Recurring Frequency
e.g. very 2nd 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 2nd month; very 6 weeks etc.

The screenshot shows a 'Recurring Cycle' configuration box. It contains the text 'Every' followed by a text input field containing the number '1', and then the word 'Month'.

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

The screenshot shows a configuration window for a birthday task. At the top center, there is a checked checkbox labeled 'Birthday'. Below it, 'Next Date' is set to '10 September 2020' with a calendar icon. To its right, 'Warning Days' is set to '5'.

Mandatory Fields for Birthdays

- Select the Next Birthday Date of the Person



Tip Birthday - John : 25 May 1977

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

