**How to Create a Task and Assign it to a User**

The best practice for **Tasks** is to create them if you want a another user in your team to take ownership of it. **Tasks** are assigned to other users. Appointments in the other hand are created when they are time specific.

By default your **Tasks** are shown on your calendar 7 days before they are due.
If you wish you can remove this view from your Calendar Module.

To change this option please use the following steps:

1. Click on **View** and **Task View Options**.
2. On the option screen make sure the option **Start Showing Tasks 7 Days Before Due** is **not** checked and select your preferred option.
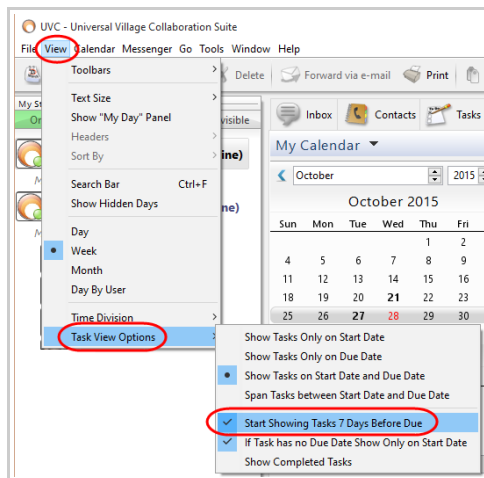


A current best practice is the assignment of tasks to other users. This is particularity useful when you want another user to take ownership of a task you created.
You can assign a user within your team a task from either the **Contact Module** or the **Task Module** screen. The preferred method is through the **Contact Module** screen as it will "link" the task directly to the contact.

*Note:* You can also crate a new task form the Inbox Module. This will directly refer the e-mail to the new task you will create. The assignee of the task will have the ability to read the e-mail and follow-up on it.
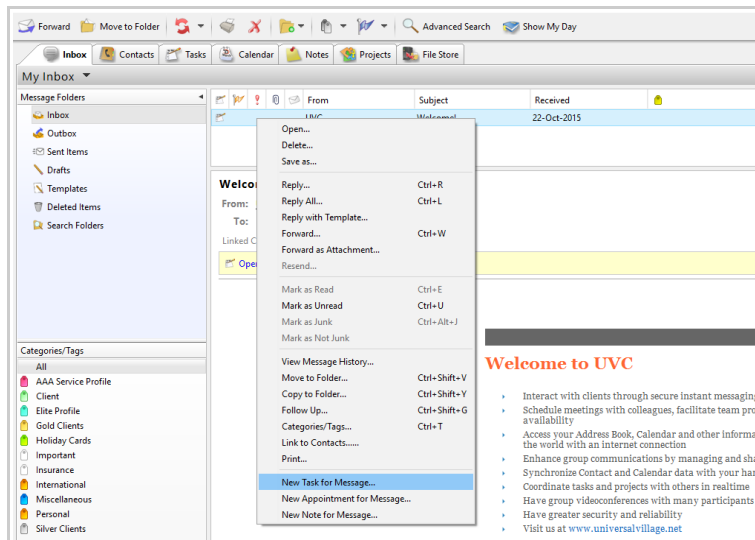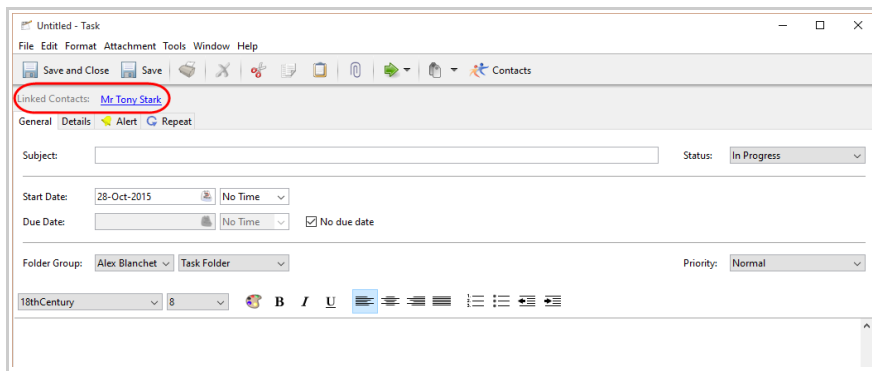
To create a task from the **Contacts Module** use the following steps:

1. In your **Contact Module** screen right click on your contact and select the option **New Task for Contact**.
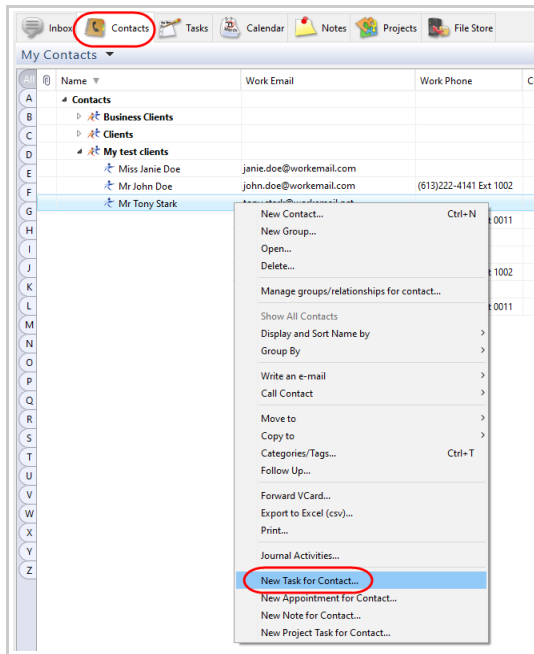


2. Automatically you will see that this new **Task** will be "linked" to the client you selected.



3. If you rather create tasks under the **Task Module** screen just remember to "link" it to the client.
   Click on the **Contacts** button locate on the top and select the contact which it should be linked to.
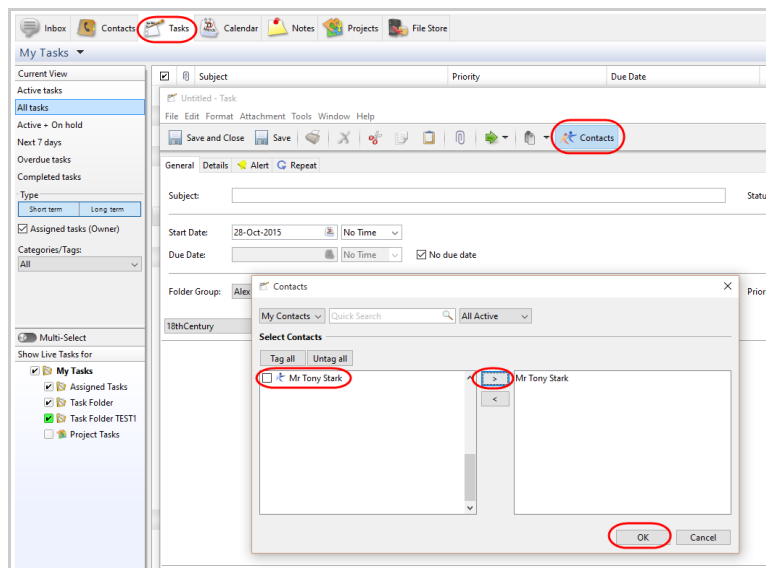
This "link" is important so that it can be historically kept under the contacts **Journal Activities** information tab.
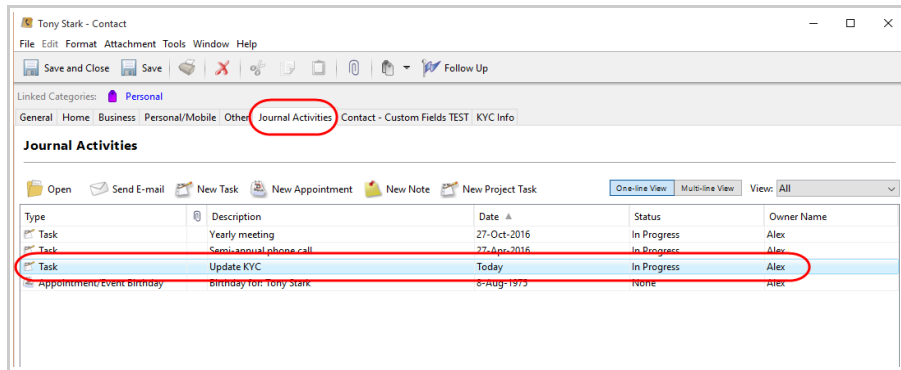


4.  To assign your task to a user on your team click on the **Detail** tab within the task window.
    Select the user from the **Assign Task To The Following Users** section.

    We recommend that you check the option **Send a new task assigned notification message** option. This option will automatically send an e-mail notification message to the selected user in their inbox.

    We also recommend that you select the option **Allow assignee to modify all fields including due date** option. This option will enable the assigned user to edit/modify the task in it's entirety. This is the preferred option.

    If the above option is not checked the assigned user will only be able to change the the status and add notes to the task.
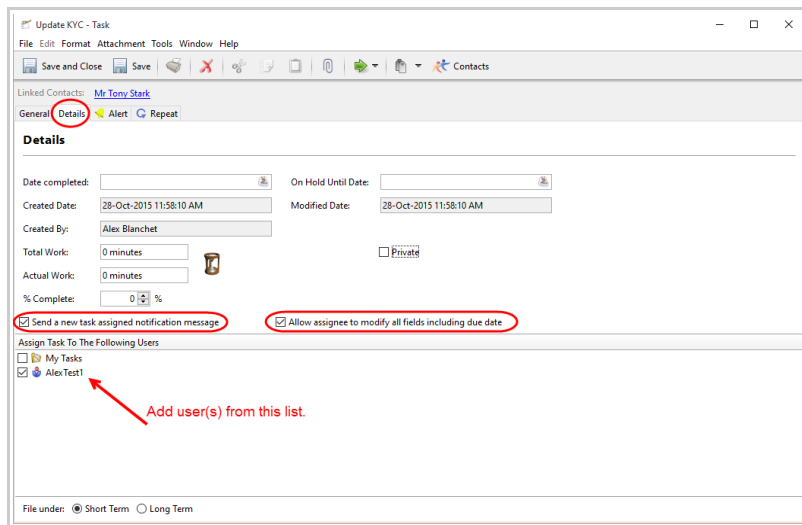


5.  Click on the **Save and Close** button to save your new task.
    An e-mail notification will be sent to the assignee of the task.

6.  Once they receive the e-mail notification message they will have the ability to **Open** the task and view it's content.
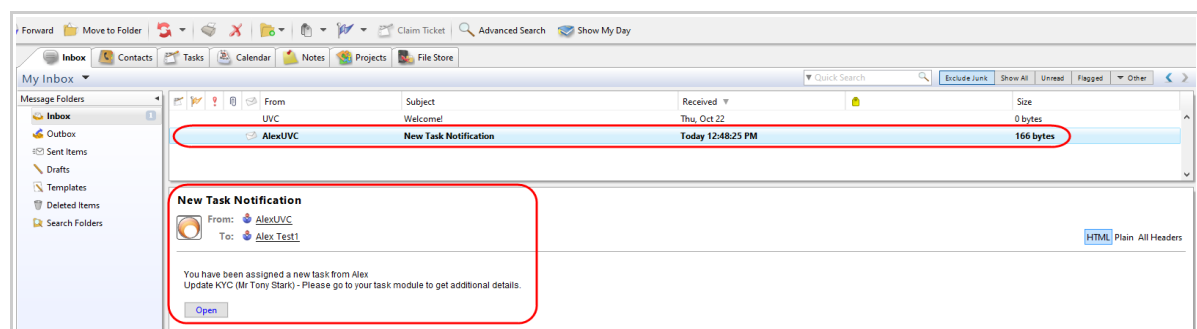
To see your assigned tasks in the **Task Module** use the following steps:

1. Click on the the **Task Module** tab.
2. Add a check mark on the **Assigned Tasks** folder under the **Show Live Tasks for** section.
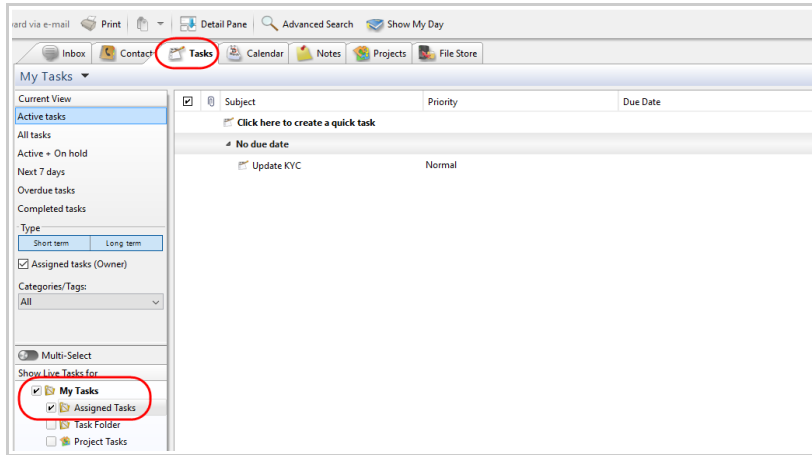


To see your assigned tasks in the Task Module use the following steps:

1. Click on the **Calendar Module** tab.
2. Add a check mark on the **Tasks** icon located under the **Show Live Calendars fo**r section.
   You will be able to see your assigned tasks on the top of the specific Start Day or Due Day.

   *Note:* that by default the 2 rules for task showing on your **Calendar Module** are:
   – Tasks with a Start Date and but <u>no</u> Due date will appear on the Start Date.
   – Tasks with a Start Date and a Due Date will appear only on the Due Date.
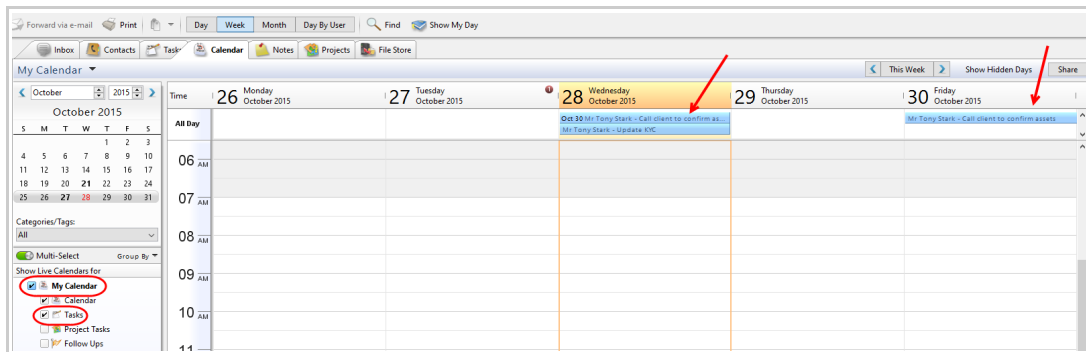


As mentioned at the beginning these task view default   options can be configurable under **View** and **Task View Options**. This option is a matter of preference and what best works for you.
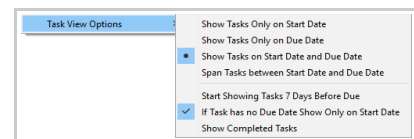


*Note:* If you want to edit a task that you have assigned to another user make sure to search and edit the task under your own **Task Folder** and have the **Assigned Task (owner)** option  selected.  If  you  do  not select this option no tasks that you have assigned will show display in your **Task Folder**.
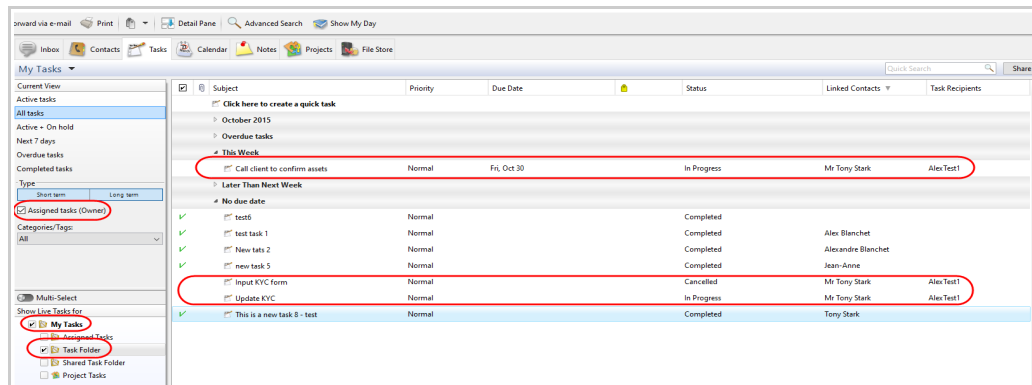
We recommend the following headers and sorting for your tasks.

Add the header **Task Recipient** to the Task view (as seen above) so that it's easier for you to know who the assigned user is for each tasks.

Including the header **% Complete** will also allow you to see how much of the work was completed and what is left to do.

Adding and <u>sorting</u> by **Due Date** will allow you to see which tasks are overdue and which ones are coming up. You can prioritize the tasks and complete the ones you judge to be more urgent.
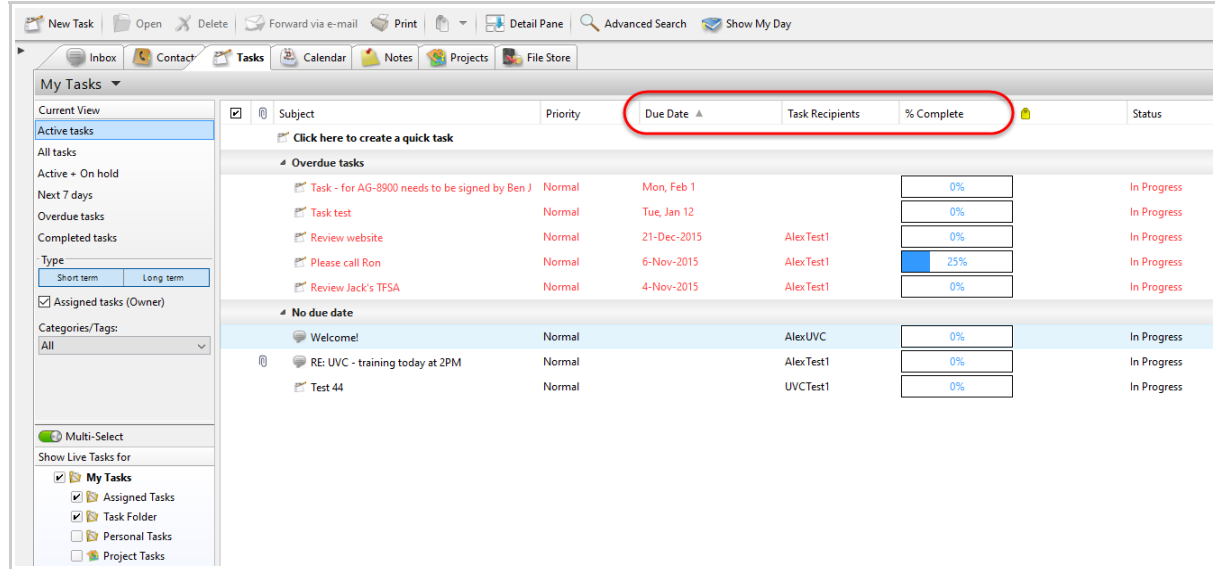


To add a header simply right click on an existing header to see the menu and select the header of your choice.