# **Enterprise - How to Utilize Tasks**

Last Modified on 02/26/2025 3:22 pm CST

### What are tasks?

A task is Enterprise's replacement of sticky note reminders, paper to-do lists, and spreadsheets listing who to call and when. Instead, the Task Management system within Enterprise allows you to electronically schedule reminders in the form of open items (i.e. tasks). If you so choose, you can even design auto-generated tasks to remind users to complete "First Day Calls" or alert users about "Unfilled Orders", etc.

\*Note\* Designing auto-generated tasks are covered in the related article, *How to Setup and Utilize Task Administration*. A user's assigned/owned tasks will display in the (1.) activity center of Enterprise, with overdue tasks marked with a red exclamation mark:



If a task is linked to a record or records, right-clicking on the task will display a menu of records directly associated with the task:



To indicate a task has been *completed*, simply select the check box to the left of that task:



#### How to Create Tasks:

There are several ways to create new user-generated tasks.

#### Drag & Drop the Avatar:

Within any open record in Enterprise, click and hold the avatar and drag it into the activity center:



Selecting this will open the task details form.

#### Log a Message:

Let's say an employee calls in sick. Instead of writing a note to call them again at the end of the day to check in, simply a task in Enterprise to remind you. When logging a message on any record select to create a task in the follow-up section. With this method, users may link a task to additional records.

Why link a task to more than one record?

Well, following our example, if an employee calls in sick it may be beneficial to link a follow-up task not only to his/her employee record but also to the *assignment* or *contact* (*i.e. Supervisor*) as they are also affected by the absence.

🗩 messa	age				
Action Absent	(Sick)	*		🖌 Im	port from Email Inbox
Ben called me, h EOD today to ch		unable to make it	t to	work to	oday. Thinks it should be a one day thing, but I'll call him at
Details	Email	Attachments			follow-up
Date/Time	9/23/2015 5	:38:21 PM			There are currently no follow-up items for this message.
Rep Name	shawna.brad				<ul> <li>Create a task</li> </ul>
Link Employee	Day, Benjami	in			schedule an appointment
Link Contact			Ŧ	2	
Customer	Stearns Traile	ers	Ŧ	ð	
Link Order	4295044450		Ŧ	ð	
Link Assignment	4301315754		*	2	

Select Create a task in the follow-up area of the Message:

follow-up	$\checkmark$	×
Task Subject	Check in with Ben	
Due Date	9/24/2015	▦
Assigned To	shawna.bradt	-
Complete Date		

Enter the *task subject* and *due date*.Indicate the appropriate *assigned to* rep. You can assign tasks to other service reps.

For example, if you are going to be out of the office and an item is urgent and must be complete, simply delegate the responsibility to another user. If you are reconsidering creating the task, click the x icon to delete. This will not delete the message.

#### From the Actions Menu:

Within any open record users can expand the actions menu and select to create a new task.



Selecting this will open the task details form.

#### Managing Tasks:

Task Details form:

When a task is created, you can utilize the task details window to add additional notes and details related to the task until the item is complete.

✓ task details			@ ×
	2.		
Subject Cold Call Gwen	Due	9/4/2015 🖩	12:00 AM ©
	Reminder		Ð
	Assigned To	shawna.bradt	T
	Category		~
	Priority	Normal	Ŧ
	Complete		
3.	4.		
messages	tas	sk links	Q, 🔤
Add a message	+ 65	Scotty Dog Lamps Inc.,	Primary
9/1/2015 9:14 AM shawna Cold called Gwen. She asked I call back on Friday, was super bu	-	Virani, Gwen (Scotty Do	og Lamps Inc., Primary)

Any text added within the subject and subsequent text box is *not* logged as a message, but can be used to store additional details surrounding your to-do item. **Section 2**:

- Due Dates: By including a due date in your task, it will be automatically flagged as overdue. Furthermore, tasks can be sorted by due date allowing users to see the most pressing items at the top of their to-do list.
- Reminders: When set, reminders will automatically pop-up to prompt users to work on the related task:

✓ reminders		?	×
I reminders			
Description	Due	:	-
Cold Call Gwen	9/4/	/2015	
Cog notes from breakfast/schedule	next meeting 9/4/	/2015	
			-
Dismiss All	Open Item	Dismiss	
Click Snooze to be reminded again in:			
5 minutes	~	Snooze	
0 🔺			

- Assigned To: The person who owns the task. All tasks that display in the activity center of Enterprise are the tasks *owned by the service rep logged in*. Ownership can change; a task can always be assigned to a new user as needed. To assign a task to another user select their name from the drop down.
- Category and Priority: Can be used for additional filtering and searching purposes in the Task Manager, if desired
- Complete: Marking the task as complete will mark it as a "closed" task. You can still search and locate closed tasks, but by default it will no longer display in your open task group.
- Note: Do not click in the box for Complete until the Task has been accomplished and the follow up reminder

is no longer needed.

#### Section 3:

• Messages: Messages allow users to track the progress of the task. When a message is logged in the task details window, it is also simultaneously posted on all records linked with the task. Consider our example from earlier, if the purpose of my task was to check in with a sick employee and I left them a voicemail, the check in really wouldn't be complete. Instead, I would add a message noting that I reached out to the employee but would not mark the task as complete until I actually connected with that person.

#### Section 4:

Task Links: When a task is linked to a record(s), users can navigate directly to them by simply selecting the icon. You may also send an outgoing email to a linked employee or contact by selecting the icon.

#### The Task Manager:

The task manager allows users to see all open and closed tasks not only assigned to them, but to every service rep in their hierarchy view. To open the full task manager select the arrow icon in the activity center:



Task Manager Dashboard:

Task Manager	🟹 Task Manager		Call Ben - Avail Now. Call a			bout SQL Analysts		
			👆 🛃	▶ tasks	appointn	nents social e	email	+ ▼ ᢒ →
	Status	Open Tasks	- Priority		Ŧ	Due between		
	Category		👻 Task Typ	e	~	Completed between		
	Assigned To		▼ Branch		Ŧ	Security Role		-
	Show Unassigned	×					Q Fi	nd Tasks
	204 results	Detailed View 🔻						+ / 🗸 🗟
	Drag a column ł	neader here to group b	y that column.					Ê
	Task	Description	Contact Info	Due	As	signed To Complete		
	Follow-up	with Candidate					Assigned To: Due: Priority: Created:	Ali Virani 9/1/2015 12:00 AM Normal 9/1/2015 12:00 AM
employee customer	Cancel Aft	ernoon Appt					Assigned To: Due: Priority: Created:	chrism 4/28/2014 1:00 PM Normal 4/28/2014 12:30 PM
order assignment contact	Look up ne	ew candidates					Assigned To: Due: Priority: Created:	Brad Cox 6/4/2014 12:00 AM Normal 6/2/2014 8:29 AM
pay / bill reports hrcenter all options		oad order asap Road Ice Cre	Order 4295022	'38			Assigned To: Due: Priority: Created:	Lindsey Schneider 6/21/2014 12:00 AM Normal 6/20/2014 12:00 AM

#### Filtering Tasks:

The Task Manager has (5.) filter options including: Status, Category, Assigned To, Priority, Task Type, Branch, Due Between, Completed Between, Security Role, and Show Unassigned. Select information from the drop down menus or calendars to limit the tasks that are displayed then click on the Find Tasks button to update your screen.

5.									
Status	Open Tasks	Ŧ	Priority		-	Due bet	ween		E
Category		Ŧ	Task Type		~	Comple	ted between		
Assigned To	richp	Ŧ	Branch		~	Security	Role		-
Show Unassigned	d 🗙							Q Fi	nd Tasks
26 results	Detailed View 🔻								+ / 🗸 🖯
Drag a colum	n header here to group	by that	t column.						Î
Task	Description	Cor	itact Info	Due	Ass	igned To	Complete		
Confirm Lunch Assigned To: richp Due: 6/30/2014 11:00 PM Priority: Normal Created: 6/24/2014 11:00 PM									6/30/2014 11:00 PM Normal
PEO Pete's, Priman Adams, Jon (PEO P									
								Accineed To:	riche

For example, if you wanted to see all closed tasks associated with a service rep, simply select (6.) closed tasks form the status dropdown and verify that the assigned to dropdown has been noted as well:



Selecting "find tasks" will display all tasks that match your filter criteria:

Status	Closed Tasks	<ul> <li>Priority</li> </ul>		Due be	tween		
Category		<ul> <li>Task Type</li> </ul>		Comple	eted between		
Assigned To	richp	- Branch		Securit	y Role		Ŧ
Show Unassigned	×					Q Fi	nd Tasks
19 results	Detailed View 🔻						+ / < 🗟
Drag a column	header here to group by	/ that column.					Î
Task	Description	Contact Info	Due A	ssigned To	Complete		
Availabilit	y Call						richp Normal 9/22/2013 11:00 PM
1 Marsh	nall, Mathew						
Availabilit	y Call					Assigned To: Complete Priority: Created:	richp Normal 10/2/2013 11:00 PM
Alfred	, Johnson						

#### **Right-Click Options:**

Right click on a task for options to create a New Task, Open Task, Mark as Completed, or to (7.) assign the task to a different service rep:

204 results	Detailed View		loseph DeCock					
Drag a column he	eader here to grou		Kevin Prow KevinP					
Task     Description     Contact Info       Follow-up with Candidate				Due Assigned To Comple			Korey VanDeWalker krikor	
ronow-up with candidate				New Task	Ctrl+N		Kyle Borgschatz kyleb	
L Moline, Irene				Open Task Mark as completed	Space Del		Laura Kluver Laura Stoerzinger	
Cancel Afte	rnoon Appt		7.	Assign to •			Lindsey Schneider	

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