# Enterprise - How to Utilize Tasks

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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:
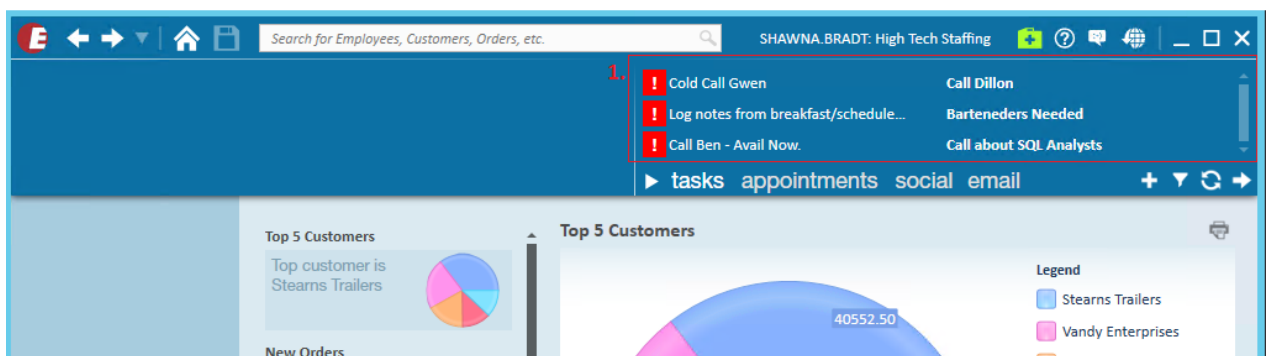
If a task is linked to a record or records, right-clicking on the task will display a menu of records directly associated with the task:
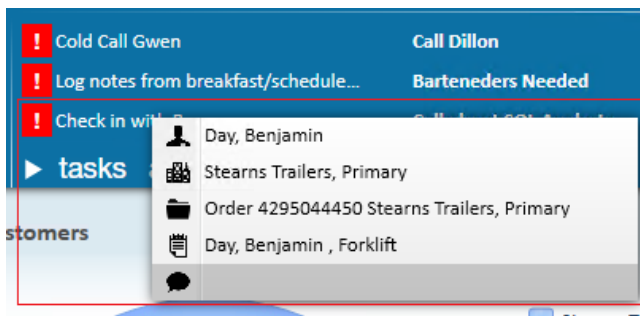
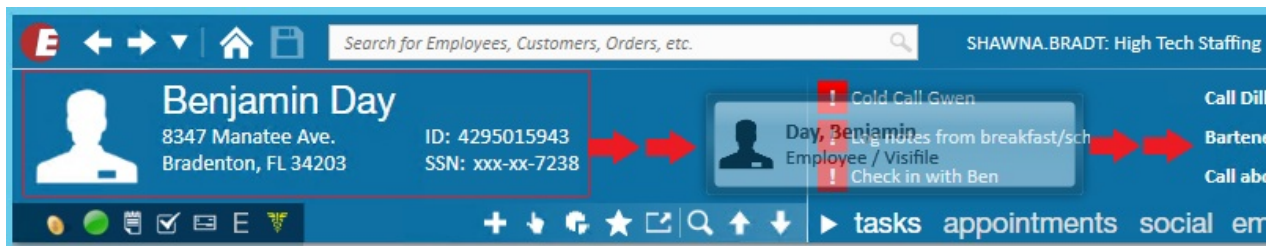To indicate a task has been *completed*, simply select the check box to the left of that task:
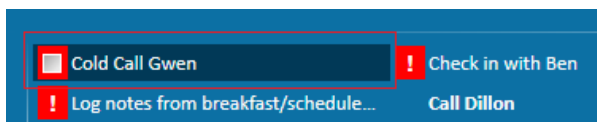
How to Create Tasks:

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.

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

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.
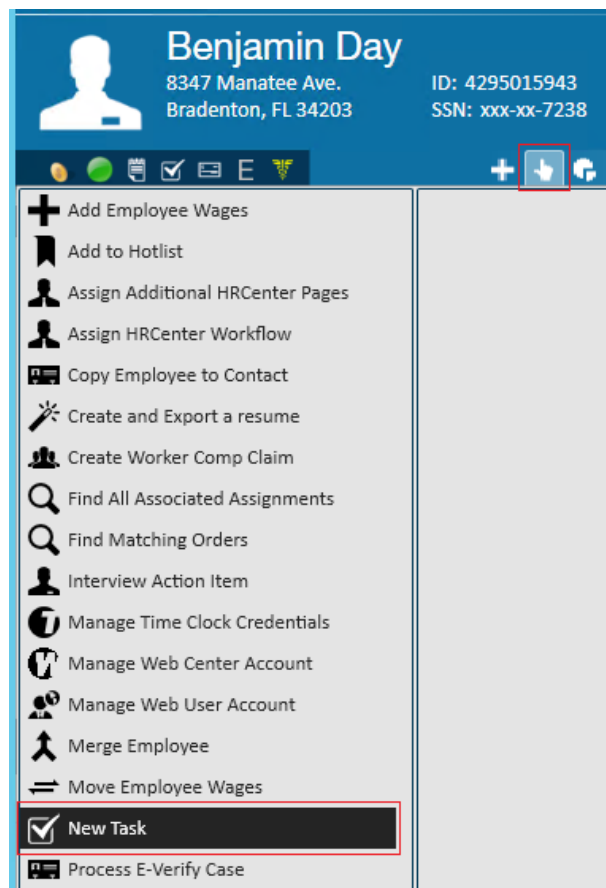
Selecting this will open the task details form.

<u>**Managing Tasks:**</u>

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.

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:

- 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 <u>not</u> click in the box for Complete until the Task has been accomplished and the follow up reminder
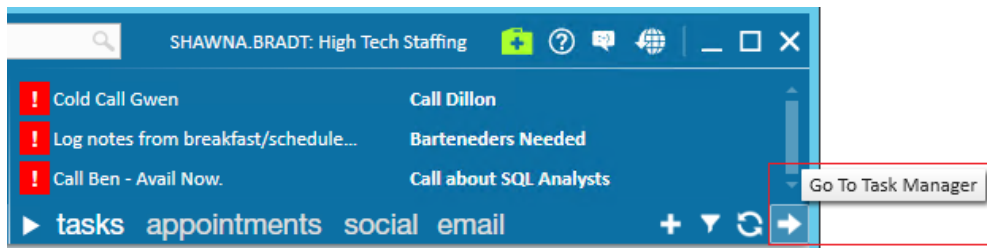
is no longer needed.

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*.
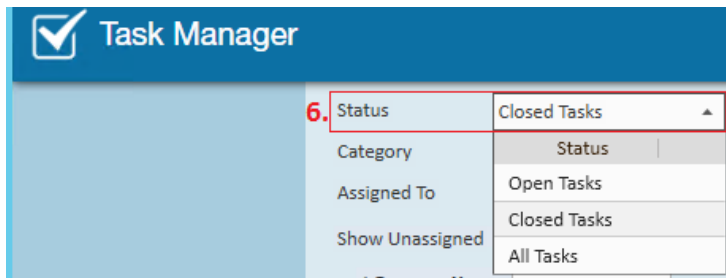
Section 4:

- 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.
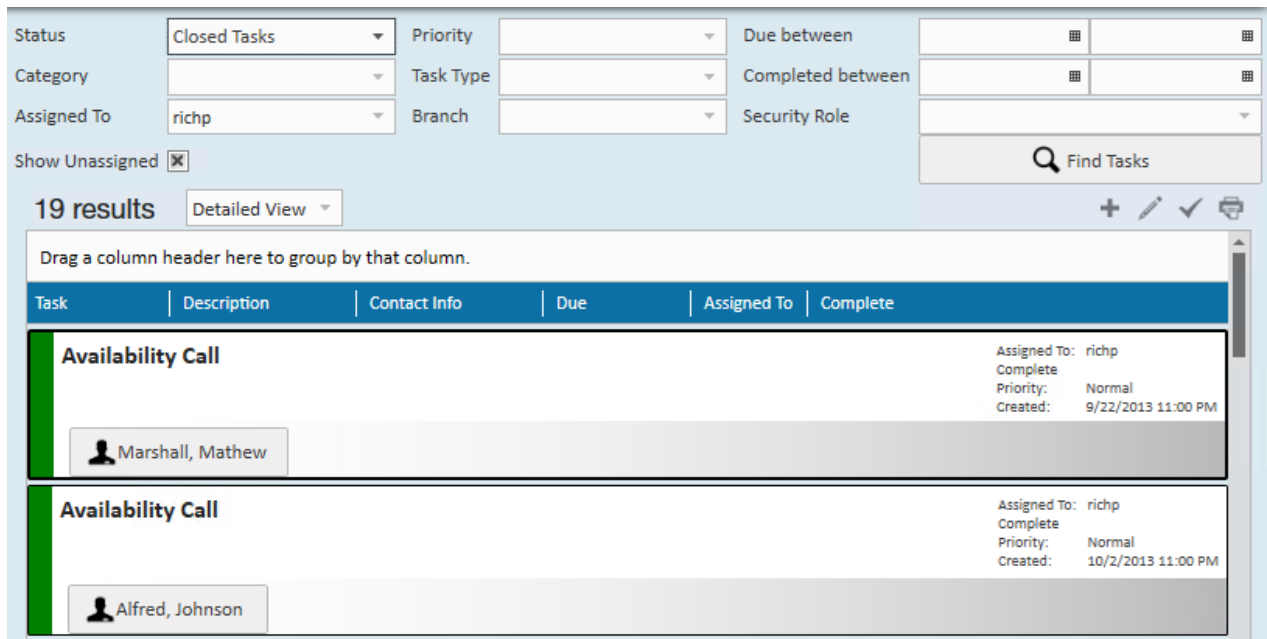

The Task Manager:

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:
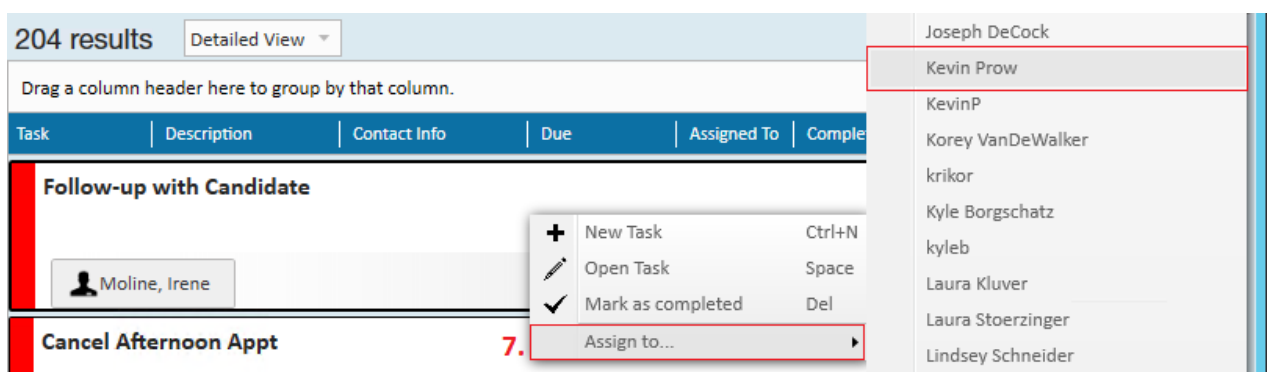

Task Manager Dashboard:

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.

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:

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:

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