

Enterprise - How to Setup and Utilize Task Administration

Last Modified on 01/15/2020 10:07 am CST

What is Task Admin?

The Task Administration section of Enterprise allows users to create scenarios where, when triggered, a task will automatically be created or an email sent.

Before We Begin

Keep in mind that when it comes to Task Administration *less is more*. Imagine the value of auto generated tasks if your system generates 20 emails and/or tasks on a dime--sure, you will have tasks for all sorts of thing, but they may lose their value and risk being viewed as spam instead of a valuable tool.

Auto-Generated Task Example:

Let's say you want to do a weekly check in call on all Employee's currently assigned. Instead of having to create an individual task for each assignment each week, creating just one condition in task administration can have a "Weekly Call" task automatically generated for your Service Reps.

Auto Generated Email Example:

Let's say you typically email an Assignment Confirmation each time an Employee agrees to work a job order through you. Instead of manually sending the email, you can establish a condition to automatically send the Assignment Confirmation email to each Employee after changing their *candidate status* to *accepted* (from the candidate worksheet in Enterprise).

Furthermore, each condition can be setup at any level within your hierarchy so that they can be distributed to a specific branch, an entire Entity, or multiple Entities (if you have more than one).

Creating Tasks

To begin, navigate to all options > Administration > Task Admin

task admin 2. +

1. Task Name Hierarchy
Event Task Status All

Unfilled Order! 5 tasks available
-- Memphis NW

First Day Calls Memphis NW

From here, you can search existing tasks by using the (1.) listed fields and dropdowns. To create new task/email conditions, select the (2.) + icon.

task setup

1. Name

2. hierarchy
Select the level of the hierarchy that you wish to have this event run for. If you wish to turn off this event, please check the Disable Task checkbox.
High Tech Staffing
 Disable Task

3. event
The event you choose determines when something should run. First, select an Event Type that want to monitor. Next, choose a condition that you want to react to.

3 a. Event Type Event enabled globally

3 b. Condition

4. action
Depending on the event type you selected above, you'll receive an email or have an Enterprise task created when the event/condition combination occurs.

5. task
Please select the task type you would like generated.

Name: Your unique name for the task.

Hierarchy: What level(s) in your hierarchy this event should be active. You are given the option to "Disable a Task" so that if you make an Entity level event *but one branch should not be included* in the event, you can disable the task for that specific Branch.

Event:

Event Type: The nature of the auto generated task or email that is to be created. The event is the end goal of the setup; this is what will happen/be created.

Event Type

Assignment Call Task Event enabled globally

Name	Description
Order Contact Candidate Status Change Email	
Unfilled Order Task	
Employee Candidate Status Change Email	
Assignment Call Task	
Online Application Complete Task	
Employee Welcome Email	

Event Condition: The thing that needs to occur in order for the event to be set into motion. For example, by selecting Second Day from the condition dropdown we establish that the event, an "Assignment Call Task," will be created when the second day of the assignment is reached.

Condition

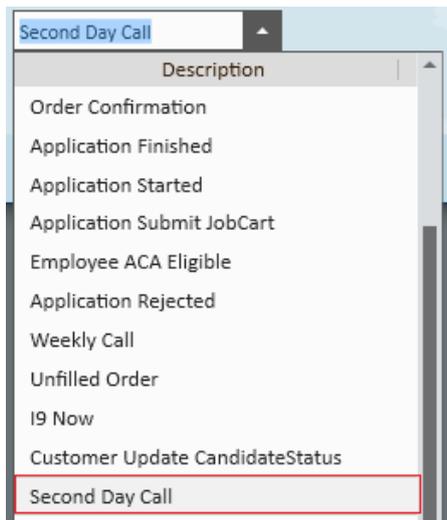
Name	Description
One Week	
First Day	
Second Day	

Note The Event Enabled Globally check box notes whether or not this task is active (selected) or inactive (de-selected).

Action: This will be one of two things - a *task* or an *email*.

Task or Email: Determines the general category regarding *which type* of action should take place and *when* the task/email should be created.

Task Example:



Email Example:

Name	Description
Candidate Email	Used for mass-mailing all the candidates for an order
Welcome Letter	Welcome letter FOR new employees
Labor Ticket Template	Sends a report with ticket details and employees assign
Skill Marketing	Sending resumes

Generated Tasks:

When triggered by a condition, the event will take place. The activity center shows two tasks (events) that have been automatically created via conditions that were established in the task admin center of Enterprise.



Double clicking on a task in the activity center reveals the task details and allows users to interact with it just as they would any other manually created task.

✓ task details

Subject: Due:

Generated Task

Reminder:

Assigned To:

Category:

Priority:

Complete:

messages

task links

- Mauti, Michael
- Harmon Electric LLC, Primary
- Order 4295033324 Harmon Electric LLC, Primary
- Mauti, Michael , Air Condng Mech

Generated Emails:

task setup

Name:

hierarchy
 Select the level of the hierarchy that you wish to have this event run for. If you wish to turn off this event, please check the Disable Task checkbox.

event
 The event you choose determines when something should run. First, select an Event Type that want to monitor. Next, choose a condition that you want to react to.

Event Type:

Condition:

action
 Depending on the event type you selected above, you'll receive an email or have an Enterprise task created when the event/condition combination occurs.

1. email
 Please select the email template you would like to use.

Email: Note that the items that display in the dropdown are email templates which can be created by users by navigating to *all options ? email ? template manager* (located in the upper left hand corner).

Name	Description
Candidate Email	Used for mass-mailing all the candidates for an order
Welcome Letter	Welcome letter FOR new employees
Labor Ticket Template	Sends a report with ticket details and employees assign
Skill Marketing	Sending resumes

The rules for the email task above state that when a candidate status is updated to (2.) *Approved*, the email template *Candidate Email* is automatically (3.) sent to affected candidates.

First Name	Last Name	Phone Number	Status	Active	Branch Name
Kate	Austen	(612) 790-0799	Approved	<input checked="" type="checkbox"/>	Memphis SE

FILE HOME SEND / RECEIVE FOLDER VIEW ADD-INS TempWorks

New Email New Items

Ignore Clean Up Junk Delete Reply Reply All Forward Respond Meeting IM More

GoTo Webinar Team Email Reply & Delete

Search Current Mailbox (Ctrl+E) Current Mailbox

All Unread By Date Newest

Today

TWSQLDEV2012
Job Announcement
Hello Kate! We have a job 5:42 PM

Related Articles