Beyond - Tasks

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Using Tasks in Beyond

Whether you are a sales person or a staffing specialist, throughout the work day you will be presented with plenty of to-do items to track. With Beyond we have a simple, elegant tool to manage those tasks.

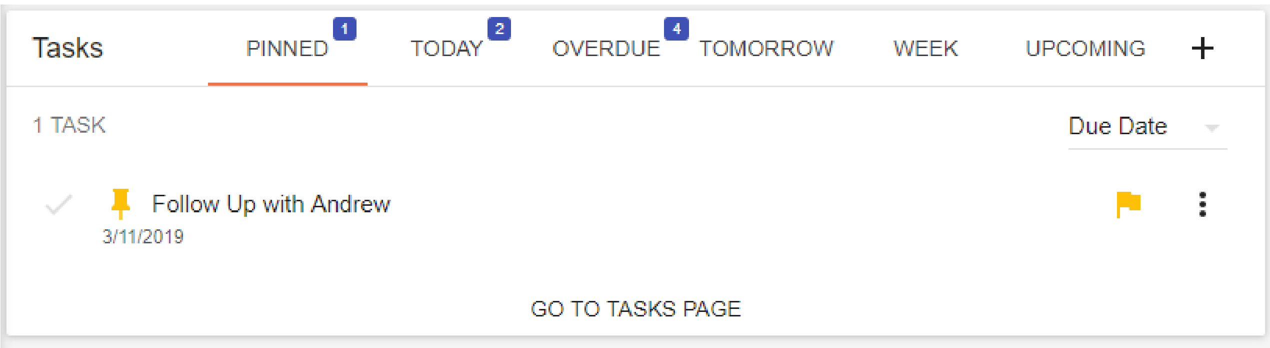
Note If you are familiar with tasks in Enterprise, tasks within Beyond are completely separate and thus will not be shared between both platforms.

In the article below, we will guide you through working with tasks and how Beyond tasks differ from tasks found within Enterprise.

The 'Tasks' Card

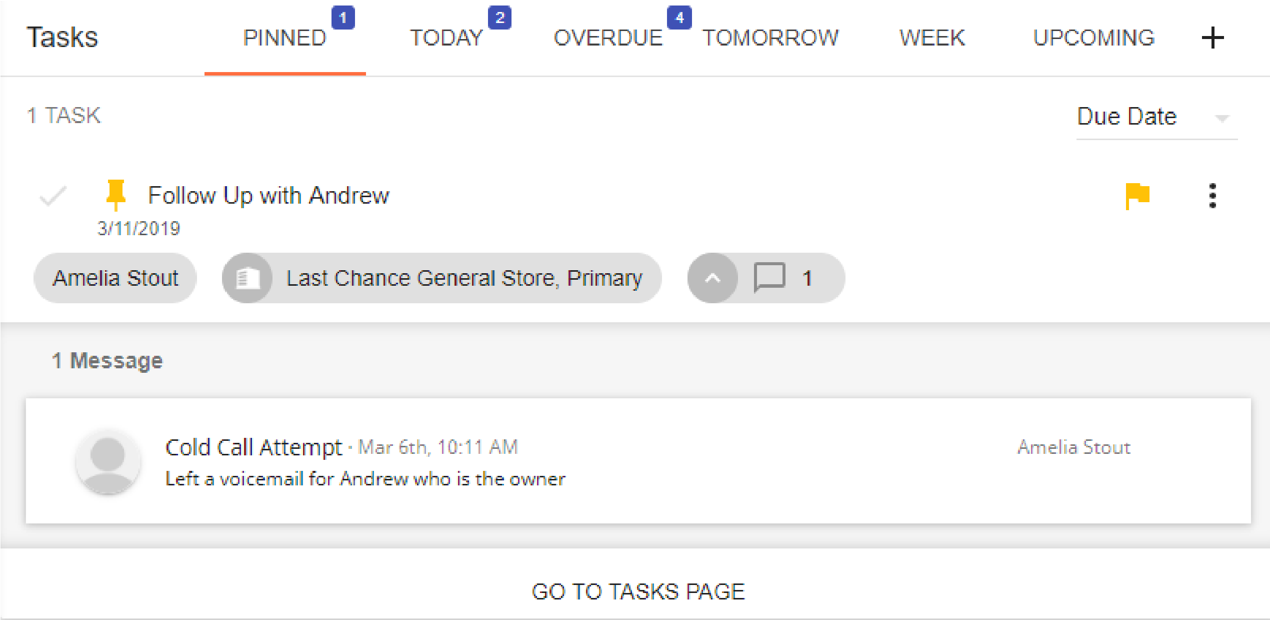
The 'Tasks' card can be found on the Beyond home screen. This card represents your current visible workload. There are five different tabs to view within the card:

- **Pinned** - Tasks that have been set aside for visibility regardless of when they are due.
- **Today** - Tasks that have a due date that matches the current calendar date.
- **Overdue** - Tasks that have a due date that is past the current calendar date.
- **Tomorrow** - Tasks that have a due date of tomorrow.
- **Week** - Tasks that have a due date that is within the current calendar date and seven days in the future.
- **Upcoming** - Tasks that have a due date that is greater than 7 days in the future.



The number in the corner beside each tab will display the number of tasks due for each section.

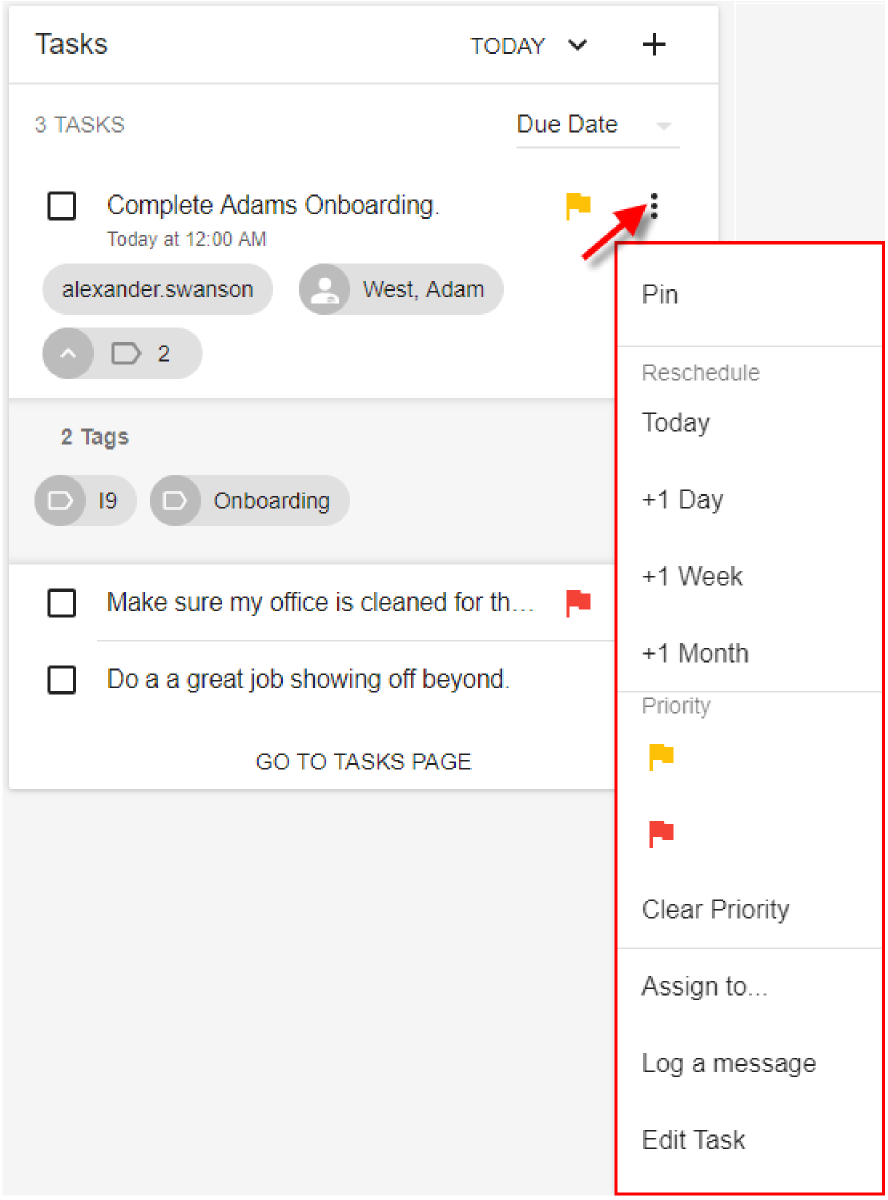
Selecting a task will reveal details about the task, including the date its due, the assigned rep, any linked records, and tags that belong to the task.



Tasks have a maximum of 255 characters, and can be as detailed as you like.

***Trainer Tip-** Try right clicking on a linked record, this will allow you to see the 'Quick View' bar.

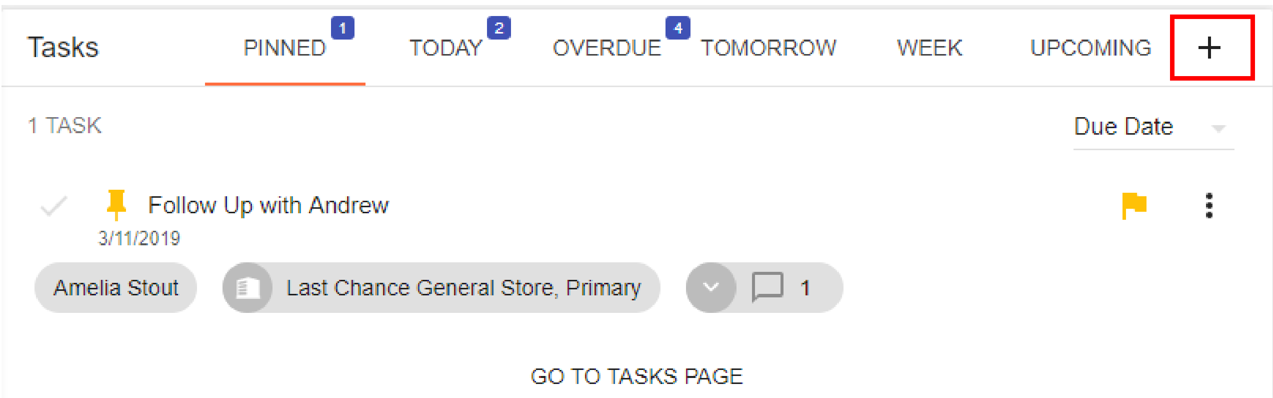
By selecting the 'more options' button tasks can be pinned, rescheduled, flagged with priority, reassigned, have messages logged on, and edited.



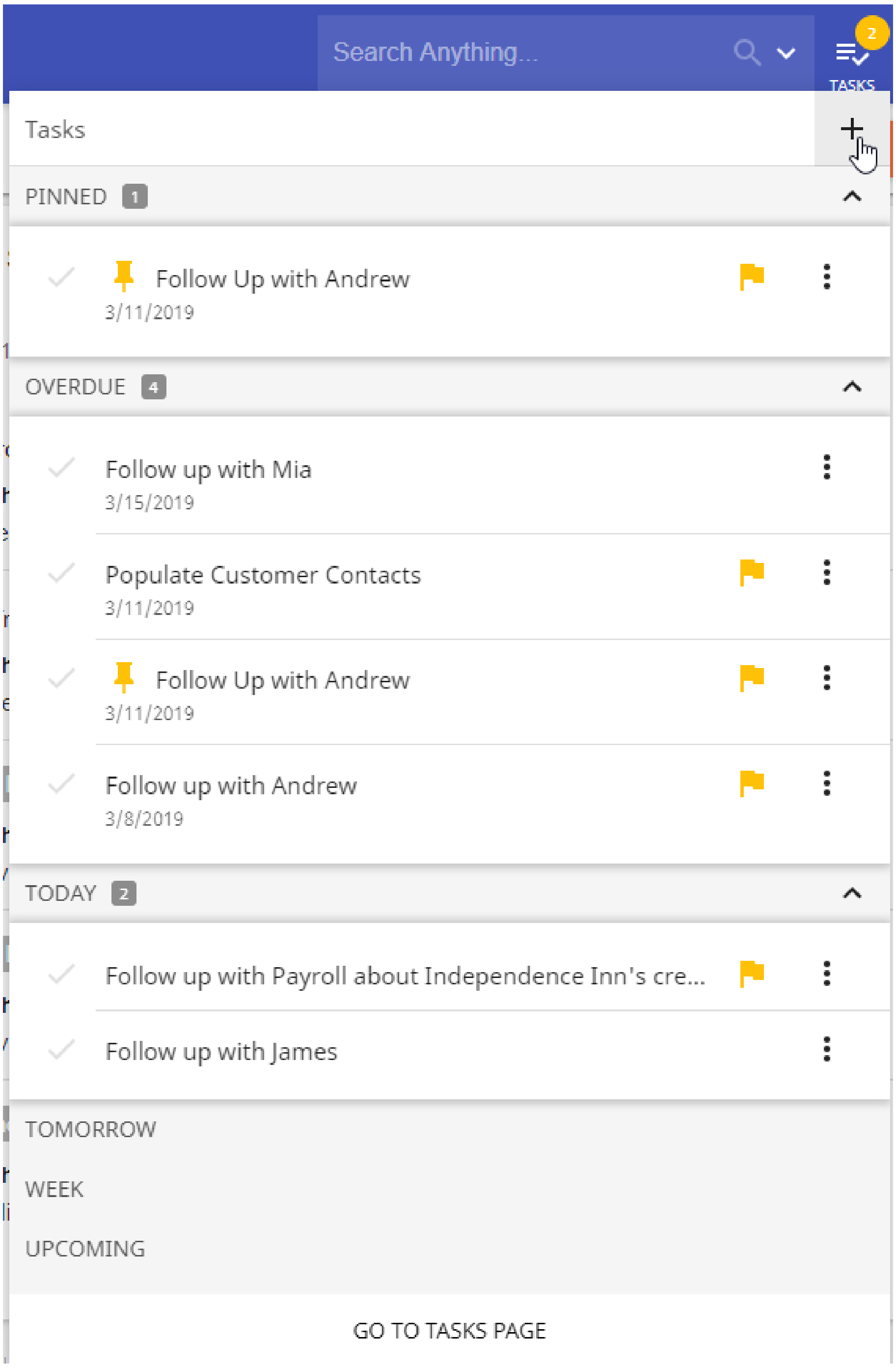
Adding a Task

Tasks can be created by...

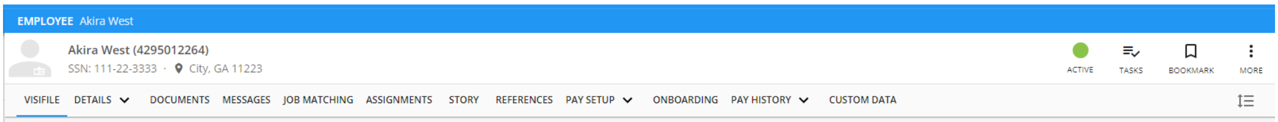
Selecting the '+' button on the 'Tasks' card.



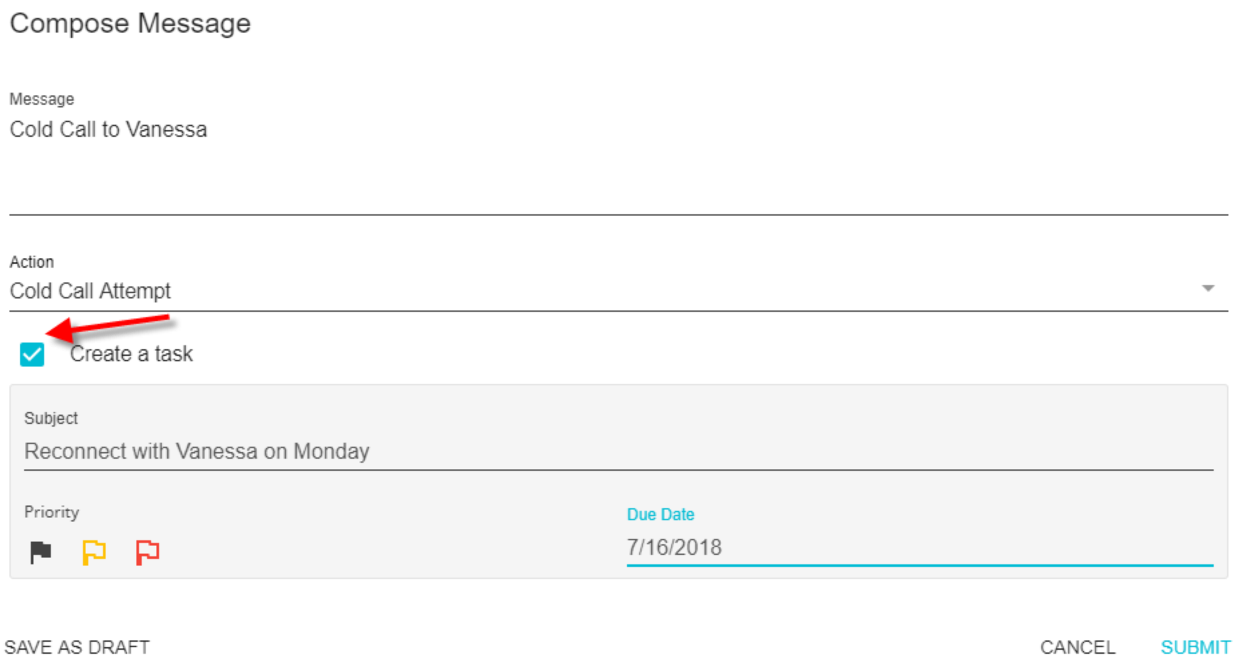
Interacting with the 'Tasks' button in the upper right corner of the screen



Interacting with the 'Tasks' charm on a record.

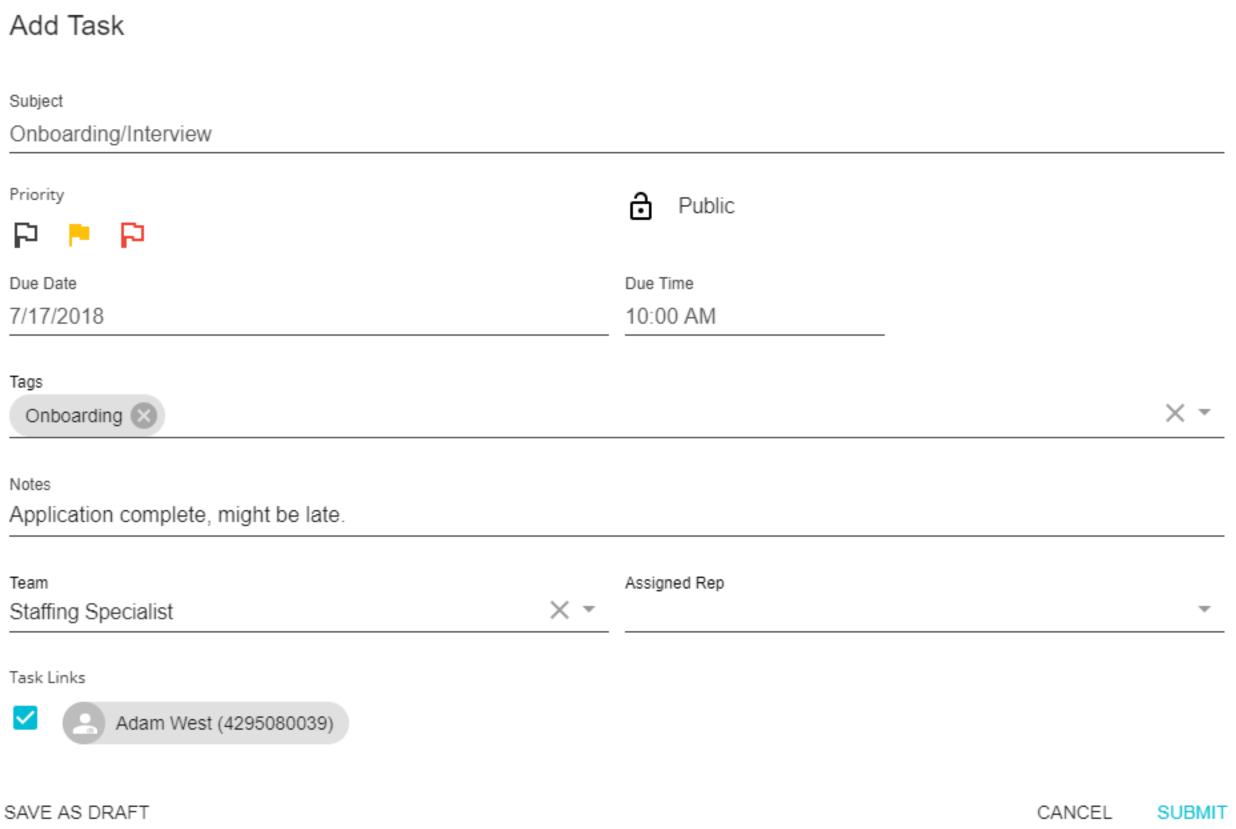


While logging a message on a record.



The 'Add/Edit' Task Wizard

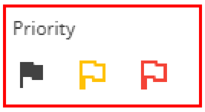
Once a task is added a wizard will display allowing you to add details to your task. The only required field for a task is a subject line. This will be the main display of what the task is.



Helpful fields on the Add/Edit Task Wizard:

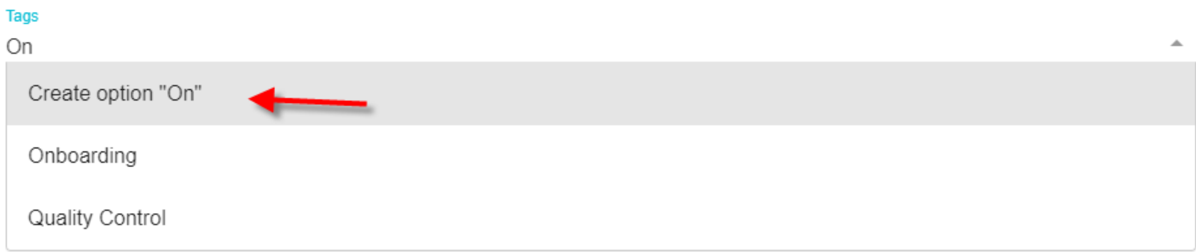
- **Priority**- A flag determining the importance of the task

- **Public vs Private**- This will determine whether the task can be viewed solely by the creator or if it can be viewed by other service reps

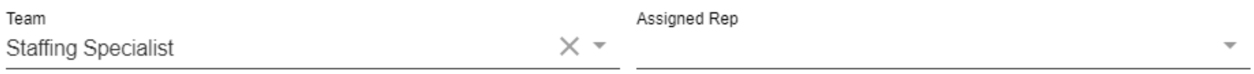


- **Due Date and Time** - These fields, while not required, will determine which tab the task will be displayed under on the 'Tasks' card.

- **Tags**- Tags allow create and manage your tasks by creating/ or searching for key words. When typing in a tag if it has been used before by another service rep, it will display as an option. If the Tag does not exist an option to create a new tag will appear.



- **Team**- Tasks can be assigned to not only an individual but also to a group of individuals who are associated by a team name. This is used primarily when working with unassigned tasks as a way to distribute those tasks. For more information about teams see Beyond - Creating & Managing Service Rep Teams.
- **Assigned Rep**- The rep assigned to complete the task. This field may be empty only if the task has a team assigned to it.

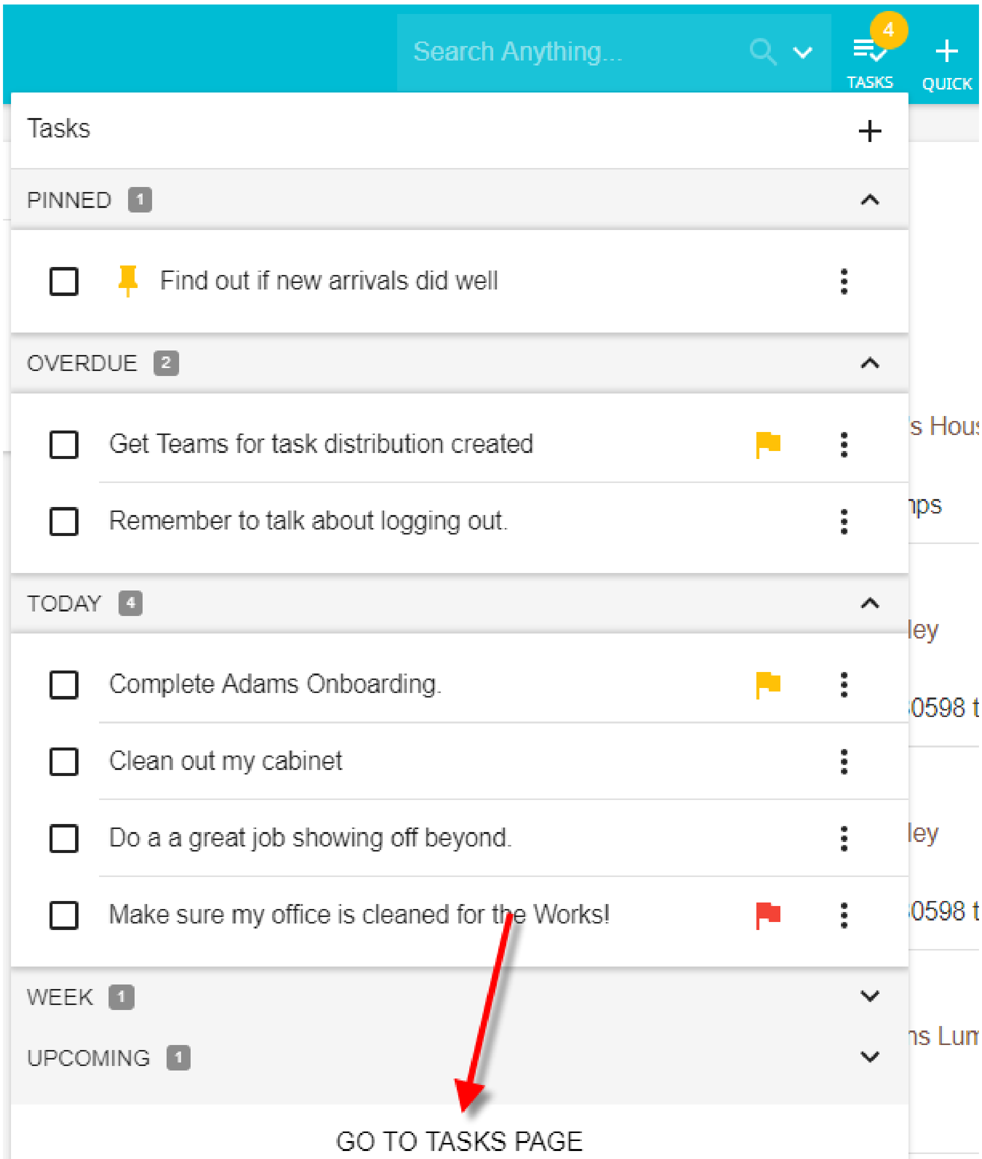


- **Task Links**- The records associated with this task.

The Tasks Page

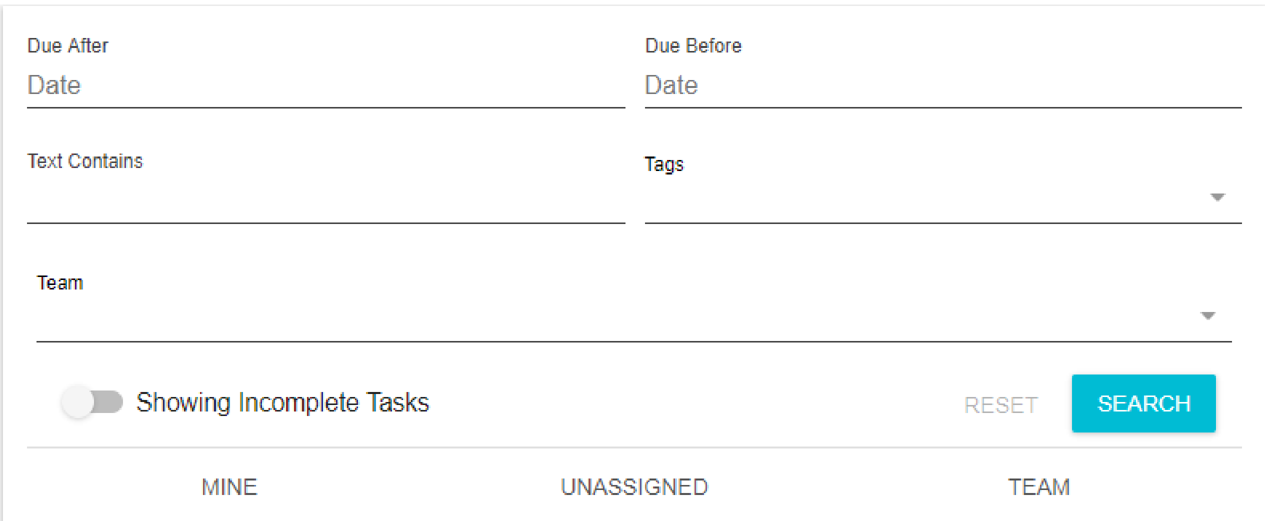
The 'Tasks' page is an area that allows users to search for and manage tasks.

To open the 'Tasks' page. Select the 'TASKS' menu in the upper corner of your screen and select 'GO TO TASKS PAGE'.



The page itself is divided into two overarching sections.

- **The Searching Area**
- **Displayed Tasks**



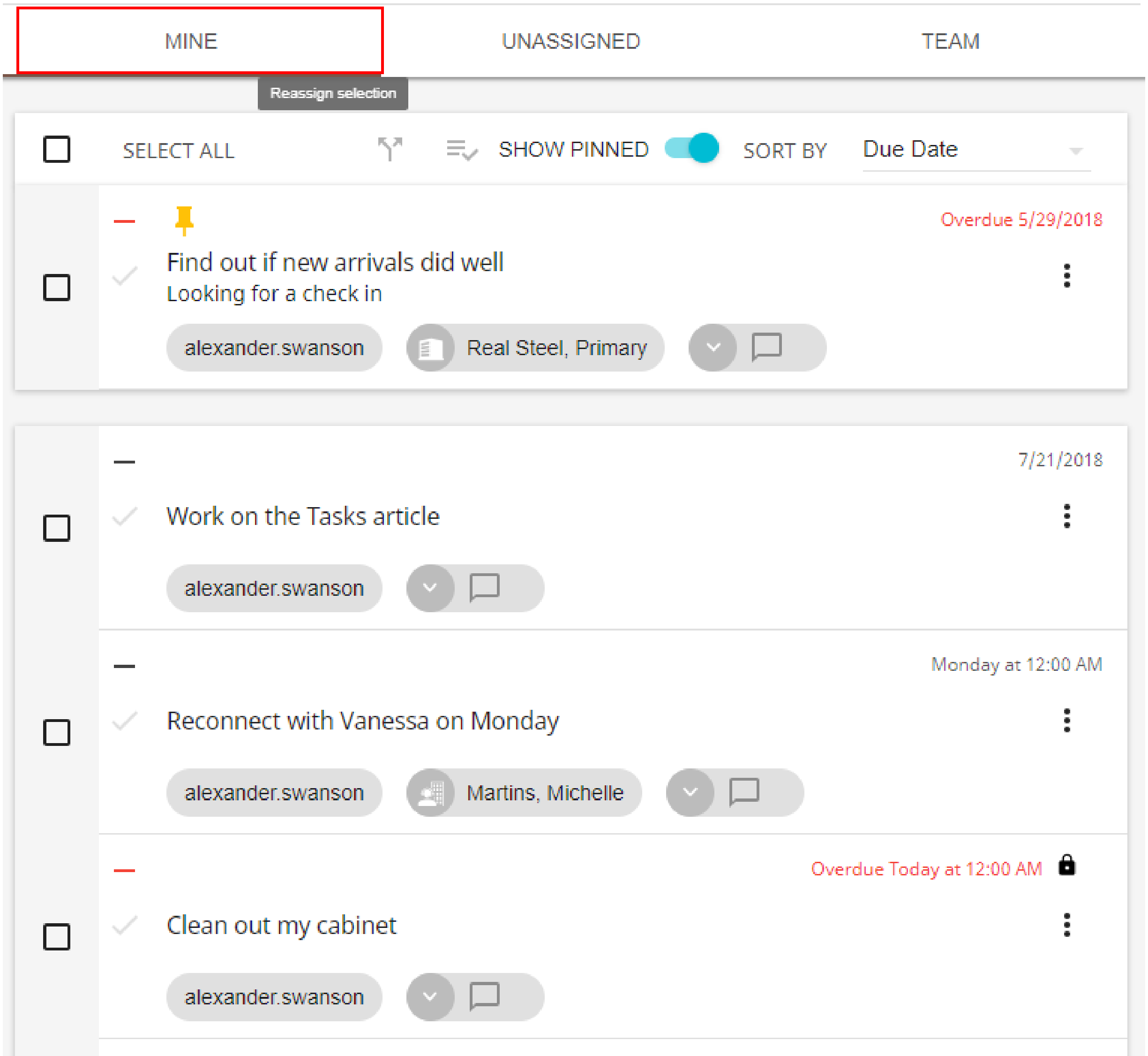
*Trainer tip- A toggle exists that will allow you to view tasks in the display area that are either incomplete or completed.

The searching area can be used to find/isolate tasks. There are three base category of tasks:

- **Mine**- Tasks that are assigned to you.
- **Unassigned**- Tasks that are assigned to no one but do belong to a team you belong to.
- **Team** - These are tasks that belong to a user on a team you also belong to.

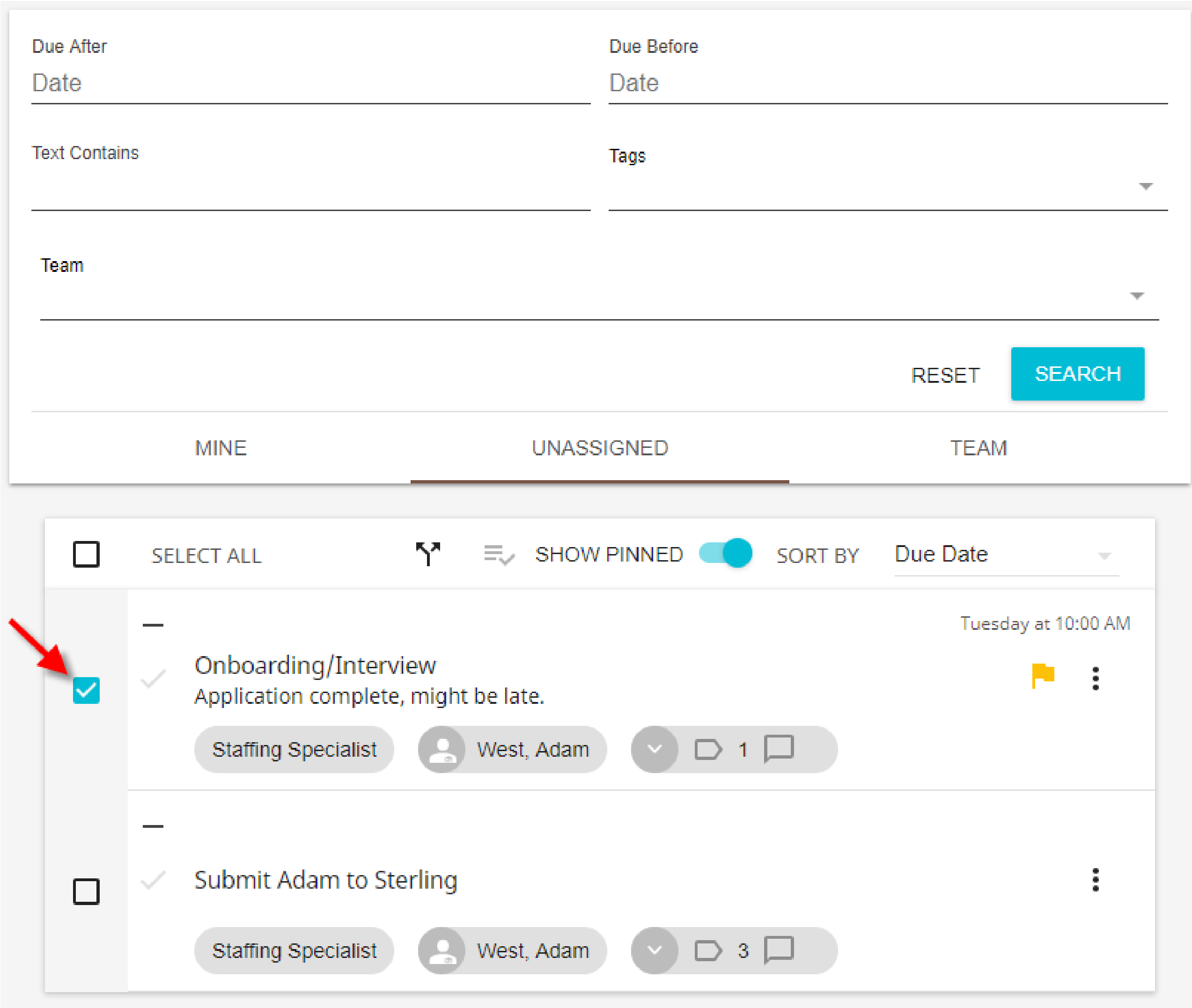
Note you will only ever be able to view tasks that belong to a team you are part of, however you can belong to more than one team.

In the display area tasks can be viewed in a similar way to how they are viewed on the 'Tasks' card on the 'Home' page.

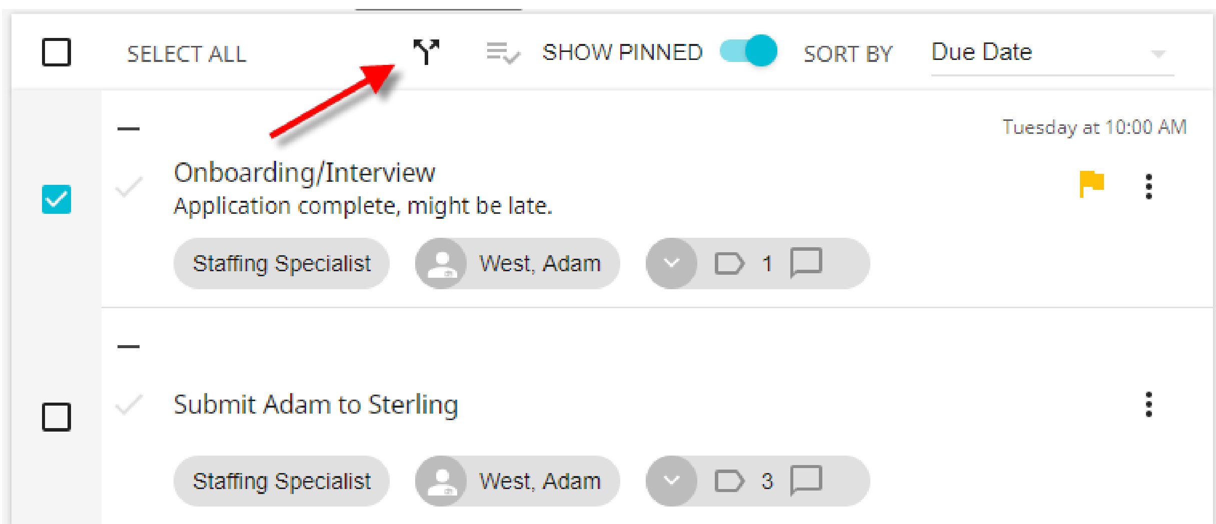


Picking Up Unassigned Tasks

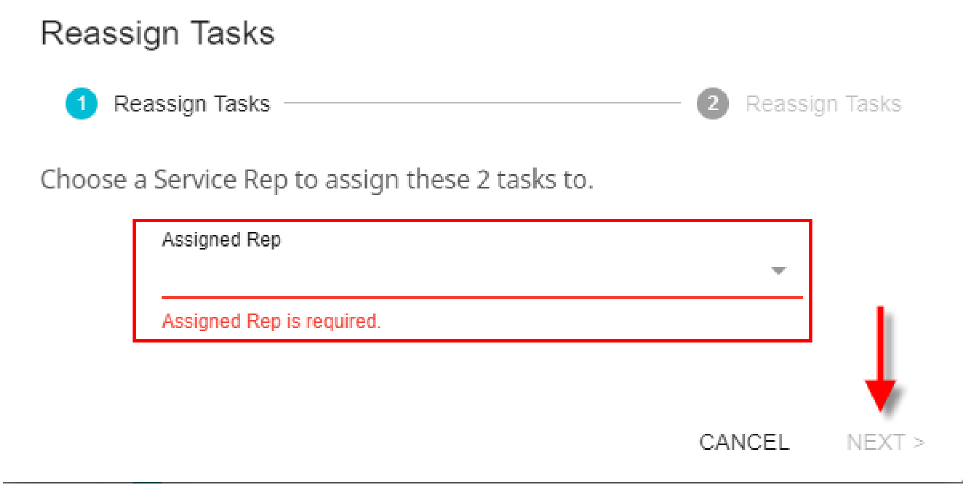
Within the 'Tasks' select to view unassigned tasks in the searching area, then select the task you wish to assign on the left. More than one task may be reassigned at any one time.



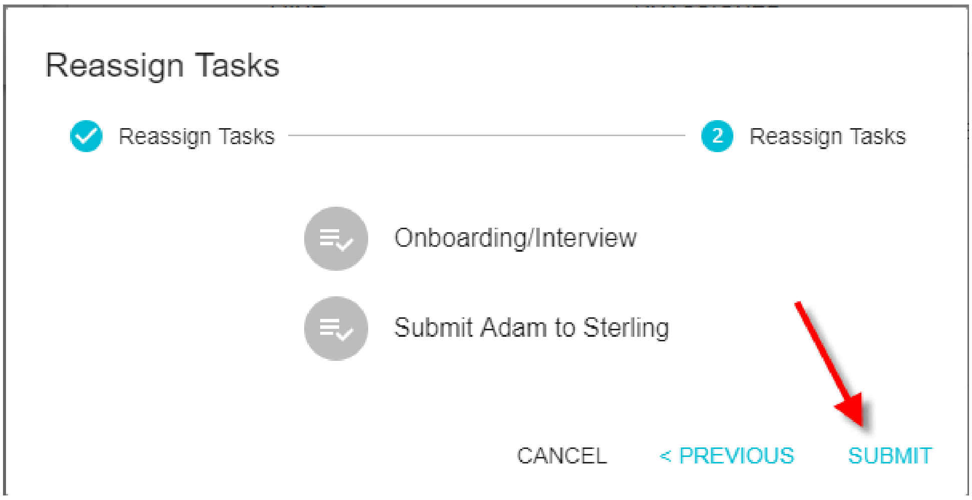
Once the tasks have been selected, select the reassign action.



This will open the 'Reassign Tasks' wizard simply select which rep to assign the task(s) to and select "NEXT>".

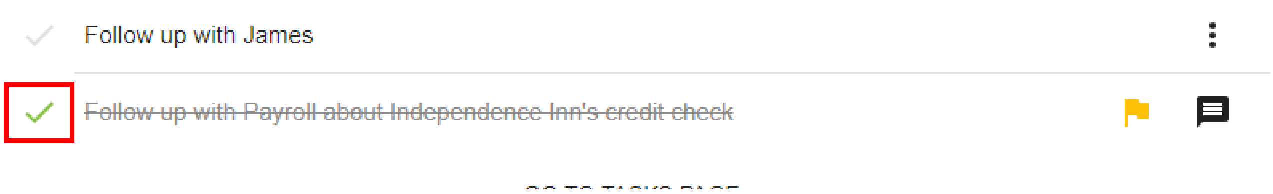


Review your selections and hit "SUBMIT".

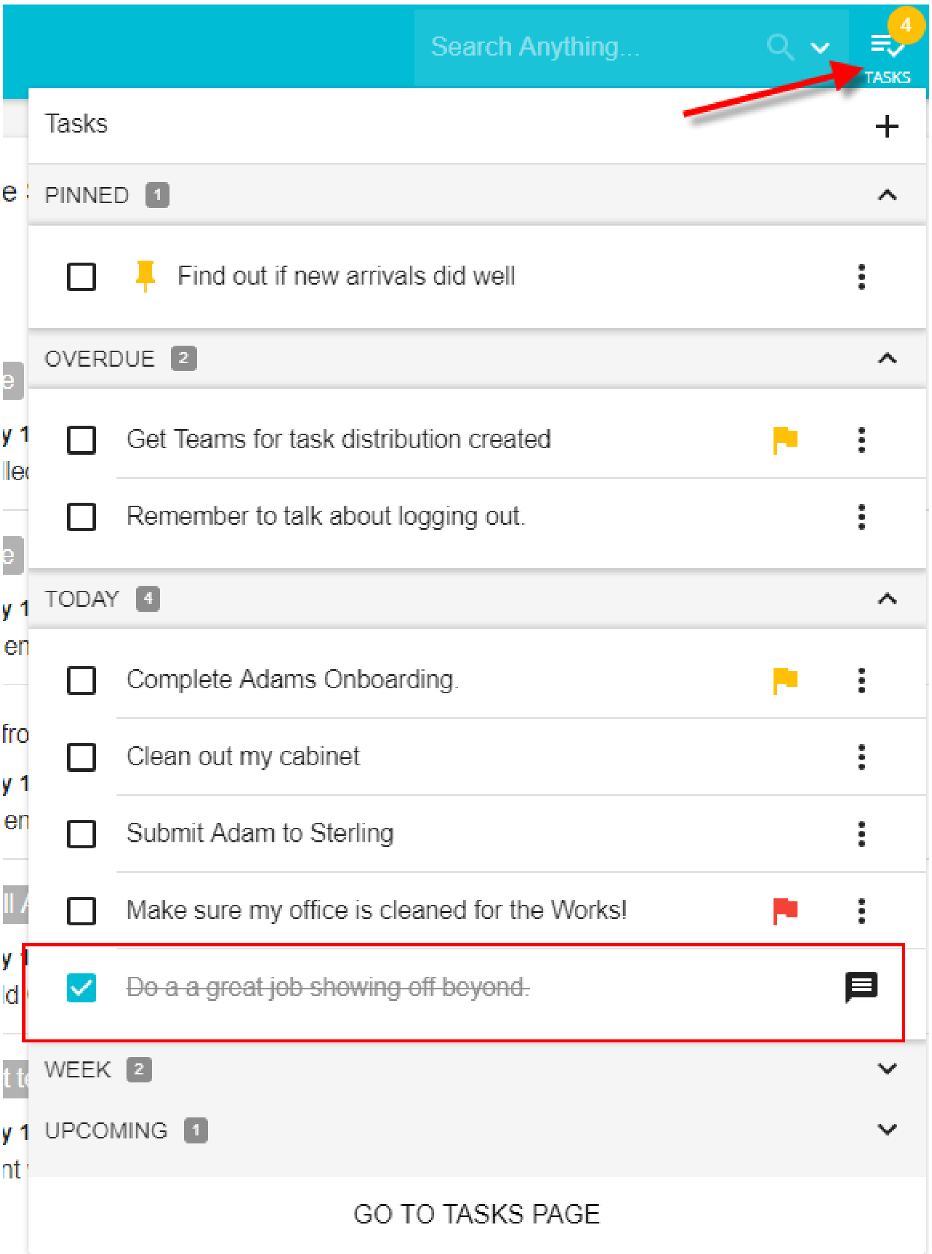


Completing a Task

To complete a task simply select the check box next to the task on the 'Tasks' card or in the 'TASKS' menu.



Completed tasks will display and may be unchecked to mark it as incomplete.



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