Assigning tasks

To set a task:

1. Click the Create button in the upper left corner and select the Task option.
2. Enter a Title for your task.
3. Select an appropriate task Category from the drop-down list.
4. Enter a contact you wish to link your task with.
5. Set a desired Due date: date and time.

    To do that, use one of the available options: Today, 3 days, Week, or select it from the calendar, or enter it manually in the following format dd/mm/yyyy.

6. Set a task reminder.

    By default, you will be informed about your task a day before its due date. If you want to change the reminder time, open the Alert drop-down list and select one of the available options: 5 minutes, 15 minutes, half an hour, an hour, 2 hours, a day. To switch the reminder off select the never option from the drop-down list.

7. Select the responsible person you wish to assign this task to from the Assigned to list.

    By default, the task is assigned to you. To change the responsible person just click the link with your name and select the user you need. Leave the Notify box checked if you wish the responsible person to be notified about the new task assign to him/her.

8. Enter a short Description.
9. Click the Save button.

Create New Task   ✕

Task title: *

Upgrade Windows 7 to 10

Task category:

Billing ▼

Link with contact:

Nagesh & Carter, PLLC ⊗

Due date: *

Today 3 days Week   11/07/2019 📅   Time: 11 ▼ : 20 ▼

Alert:

a day ▼

Assign to: *

Hilda Mwangi ▼   ☐ Notify

Task description:

Upgrade Harry's and Ann's PC from Windows 7 to 10
Update drivers

[Save]   [Cancel]

If you need to edit a task,

2. select the task you need from the **Tasks** list,

4. make all the changes you need and click the **Save Changes** button.

You can also complete a task just right in the **Tasks** list changing its status from **Open** to **Closed**. To do that, just click the arrow   to the left of the task title and select the necessary status from the list.

To delete a task, choose the corresponding option from the **Actions** drop-down list.

Online URL: