# Tasks - How To's

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- Your To-Do lists or **Tasks** can be recorded in relation to other records such as **Customers**, **Vendors** and **Jobs** which provides a very detailed and systematic way of recording them.
- **Tasks** appear on these screens:
  - **Task List** screen
  - **Customer Detail > Tasks** tab.
  - **Vendor Detail > Tasks** tab.
  - **Job Detail > Tasks & Emails** tab.
- A **Task** has a field called **Job** which displays the Job# if that particular Task is related to a specific Job.

- Shortcut Key: **Ctrl + F12**, or
- On the **Quick Start Menu**, click the **+** icon and select **Task,** or
- Click on the **New** button on the lower left part of the **Task List** screen, or
- Right-click on an existing Task Record on the **Task List** Screen and select **Add New Task** or **Add New Completed Task**.

- On the **Customer Detail** screen>**Contacts** tab, right-click any Contact Name and select **Add New Task** or **Add Completed Task,** or
- On the **Customer Detail** screen>**Tasks** tab, right-click any existing Task and select **Add New Task** or **Add Completed Task,** or
- On the **Customer Detail** screen>**Tasks** tab, click on the **New** button on the lower left part of the screen.

- On the **Vendor Detail** screen>**Contacts** tab, right-click any Contact Name and select **Add New Task** or **Add Completed Task,** or
- On the Vendor **Detail** screen>**Tasks** tab, right-click any existing Task and select **Add New Task** or **Add Completed Task,** or
- On the **Vendor Detail** screen>**Tasks** tab, click on the **Add New Task** button on the lower left part of the screen.
- On the **Vendor List** screen, right-click on any of the fields of a particular Vendor and select **Add New Task** or **Add Completed Task.**

- On the **Jobs Detail** screen, **click on the Add New Task button on the lower left part of the screen,** or
- On the **Jobs Detail** screen>**Tasks & Emails** tab, right-click any existing Task and select **Add New Task** or **Add Completed Task,** or
- On the **Job List** screen, click on any of the fields on any of the Job records and select **Add New Task** or **Add Completed Task.**

Below are different ways to edit Task records.

- On the **Task List** screen:
  - Click on the **Edit** button (bottom left) to unlock the screen where you can edit the following details:
    - **Task Complete** checkbox, task priority codes **ABC** and **123**, **Company Name**, **Date**, **Description**,

**Results**, **Scheduled For**, **Scheduled By**, **Billable** and **Task Billed** checkboxes, **Est Time**, **Start Time**, **Stop Time**, **Type**, **Private** checkbox
    - Click on the **Lock** button (bottom right, red box) to lock and save the changes.

- On the **Task List** screen:
    - Click on any Task to show the **Edit Task Pop-up** screen to edit more details that cannot be edited on the **Task List** screen.
    - Click **Save**.
- To edit Task/s related to a Customer (or Vendor):
    - Go to **Customer Details** screen>**Tasks** (or **Vendor Details screen>Tasks)**.
    - Click on the **X icon** under **Action** column.
    - Click **No** when prompted **'Are you sure? (to delete)'.**
    - Edit the details on the **Edit Task** screen.
    - Click **Save**.

Below are different ways to delete Task records.

- On the **Task List** screen:
    - Click to check the box/es of the row/s of Tasks under the first (left-most) column that you want to delete.
    - Click on **Batch Actions dropdown** button then select **Delete Selected**.
- On the **Edit Task pop-up** screen, simply click on **Delete** (red button).
    - Click **Yes** when prompted **'Are you sure you want to delete this task?'**.
- To delete Tasks related to a Customer (or Vendor):
    - Go to **Customers Details** screen>**Tasks** (or **Vendor Details screen>Tasks)**.
    - Click on the **X icon** under **Action** column.
    - Click **Yes**.

- On the **Main Menu** bar, click on **Reports > Tasks.**
- Click on the **drop down icon** to select the **User** under the **Report Criteria** section.
    - **Note: You can adjust the period covered by your report. On the Report Period filter section, select from the drop down filter lists or manually input the dates 'from' and 'to'.**
- Click on **Run Report**.
    - Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    - Note2: At this point, you may choose to **Print**, **Email** or **Download** your Report copy.

- After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.
- On the **Customize Report popup** screen:
    - (Optional) Select the **Min Access Level** from the **drop down** icon.
    - (Required) Type in the **Report Name** (whatever you want to call your Report).
    - (Optional) Type in any **Report Description**.
    - (Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
    - Click on **Save.**
    - Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** (if you checked the

**Favorite** box).
    - Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
    - Note3: Click on the **X** button to permanently delete any Custom Report from the list.
- Note: You have the option to **Email**, **Print** or **Download** a Report copy (see instructions below).

- On the **Task List** screen:
    - Select the record(s) by checking the box(es) .
    - Click the button to **Print** and to **Download** (in Excel form).
    - There is also an option to **Share** record(s) and this feature will be available in the future.
- For Task Reports, go to **Main Menu Bar** > **Reports** > **Tasks,** create your Report (*see previous instructions) then click on the button (upper right).
- The **Print Preview** popup screen will appear.
    - DOWNLOAD COPY: Click on button (upper right) to **Download** the Report. Save in your PC.
    - EMAIL COPY: Click on

      Send Email

      button (lower right) to **Send** a copy of the Report through email. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on

      Send Email

      button (lower right).
    - PRINT COPY: Click on **button** (upper right) to **Print** the Report. Adjust Print Settings then click on

      Print

      button (lower right).

- Tasks can be viewed all on 1 screen, for all related **Customers**, **Vendors** or **Jobs** (assigned to the Logged In User) by pressing **F11**.
- It is divided into three (3) main sections to organize data and functions:

### Section: Header

- **Filters** (section):
    - **Assigned To**: ALL, (Logged in User--which is the default value), All other users will be in the drop down list.
        - NOTE: If i am logged in as User X and I select User Y (or All) I will only see the Tasks assigned to UserX (or All users) for the tasks that are listed as Visibility: Public.
    - **Completion**: ALL, Open, Closed (Open is the Default)
    - **Type**: ALL (default), and other types of Tasks entered by all users (for that company)

- **From Date**: This is a field that shows the From Date (with a Calendar popup selection box). By default it will show 1/1/2000.
- **To Date**: This is a field that shows the To Date (with a Calendar popup selection box). By default it will show Today's date.
- **NOTE**: Each time any of the filters are changed by the user the list will refresh.

### Section Line Item Header

- **Batch Actions**: This will include options to:
  - **Delete Selected**: This will delete all selected records that do NOT have any dependencies. Dependencies for each type of list will be listed below.
  - **Export Selected**: This will work the same as if the user selected a few records and then clicked on the download button.
- **Search box**: This will search by keyword in ALL visible columns and narrow the displayed list of records to match the search criteria (after the user presses the Enter key).
- **Include Inactive**: This is a checkbox that will include the Inactive records in the list. Inactive records will be displayed in a **light grey color** (so the user can see the records but also is able to easy identify the record as an Inactive record).
- **Gear Icon**: This is located on top of the column headers over to the far right. When clicked this will drop down a small window with a section called Columns that will have a list of fields that can clicked to display the column or unclicked to hide the column.
- **Share Icon**: When clicked this will give the user the option to export 1 record via Email or Text. (If the user has more than 1 record selected then pop this message: *"Please limit your selection to only 1 record before proceeding. "*
- **Print Icon**: Pop up the Print Dialog for that screen (to show the various options to print).
- **Upload Icon**: Pop up the Data Upload Wizard.
- **Download Icon**: Pop up the Download Download Wizard.

### Section: Line Item Columns

- **Column Headings**: All headings will be **bold**.
- **Columns**: There will always be a checkbox column on the far left and a magnifying glass column to the right of the checkbox column. All columns will be movable and resizable.
  - Sort Order (icon) for Drag and Drop sorting.
    - NOTE: The ABC and 123 fields will be the ultimate SORT ORDER. However, if the user uses the drag and drop sorting icon then (if possible) we will need to change the ABC and 123 to match the new position.
  - Task Completed (Required)
  - ABC: (This would be an alpha numeric field)
  - 123: (This would be a number field that allowed decimals)
  - Company Name (Required)
  - Contact Name (Required)
  - Date (Required)
  - Time
  - Description (Required)
  - Results
  - Sched For
  - Sched By
  - Role
  - Job
  - Time Scheduled

- Billable?
- Est Time
- Start Time
- Stop Time
- Actual Time
- Billable Time
- ContactType (Hidden)

### Section: Footer

- **New** button: Add a new Task.
- **Edit** Button : Edit Tasks.
- **Refresh** button: Refresh the screen based on the filter selections on the header.
- **Help button**: Display help topic for that screen.
- **Close button**: Close the form (and the tab).

### Section: Batch Actions

- **Delete Selected**.
- **Create Invoice For Selected.**
  - This option assumes the user will select 1 or more tasks, where the Billable = True and the Task Billed = False. When the option is executed it will open up a NEW Invoice and auto fill in the Company for the First task that has a task, and auto fill in LINE ITEMS for each task, and auto insert the Billable Time (in the task, if there is one) and then auto calculate the PRICE for the that item for that customer (Based on that Customer's Custom Pricing options and/or Default Pricing Options--if there are NO custom prices for that item for that customer).