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Tutorial

Task Management

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Task Management

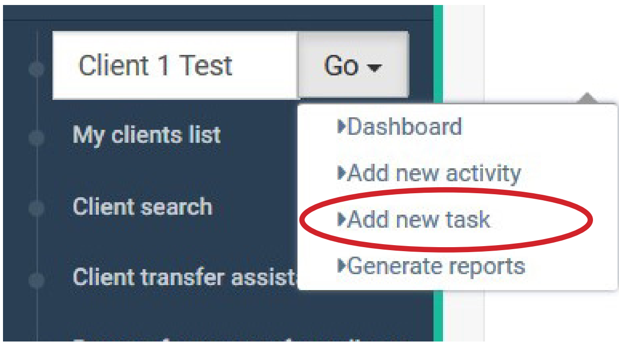
This tutorial is helpful to create a task to do (Signing a document, withdrawing, contribution, contacting the client...), to add a new subject to activity report, and to link PDF documents to a task.

Task Management - Overview:

1. Click on "Client".
2. Create a new task.
   Create a simple task.
   Create a recurrent task.
   Add PDF document to the task.

Task Management - Details:

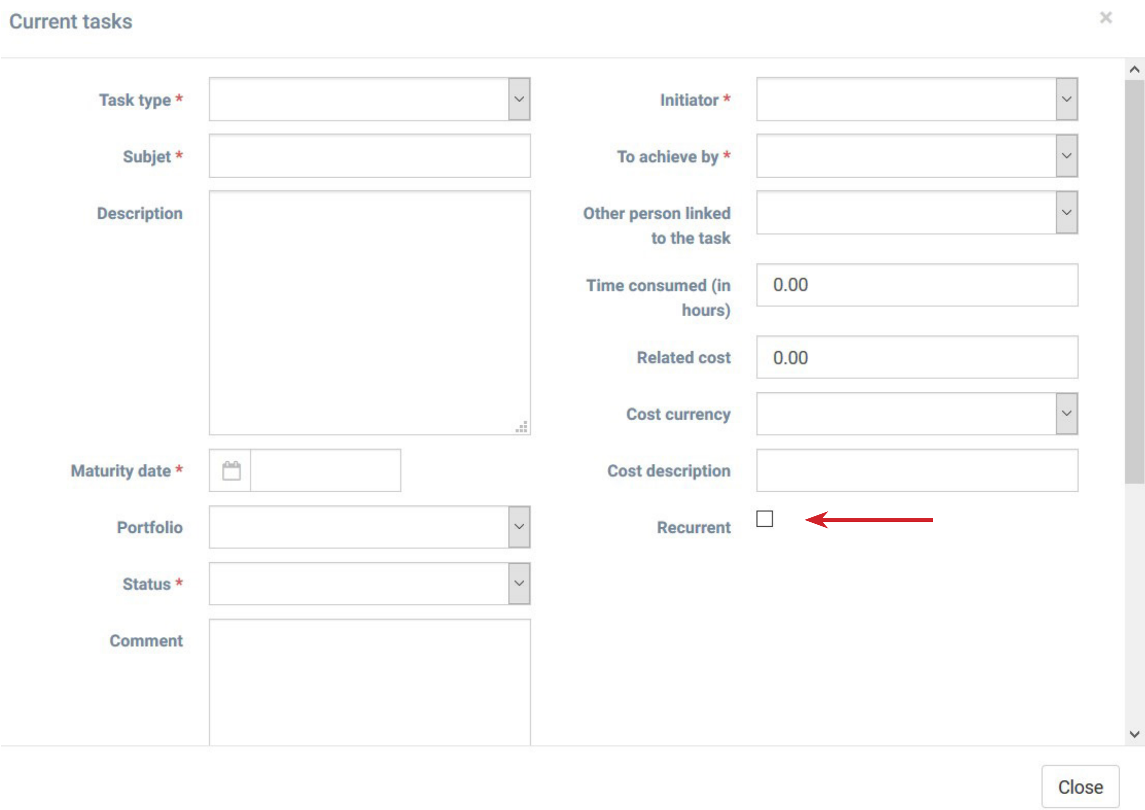
1. Click on "Client" in the main menu and search for the client's name.
2. Select "Add new task" in the drop-down menu, which appears on the "Go" button.



Another way to reach this step is:

a. Go to the client's dashboard.
b. In the "Administration" menu of the client's dashboard, select "Current tasks".
c. Click on "New" to create a new task.

3. Fill in the form.

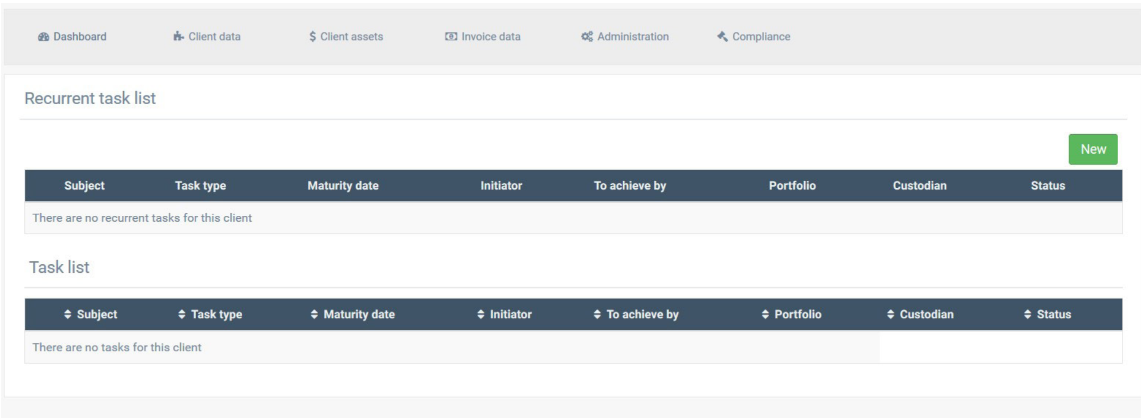


If the task is recurrent, don't forget to check the recurrent box. Then you will be asked:

- The recurrence type: the frequency at which the task will create child task.
- The start date: the date that the recurrent task will start from.
- The end date: the date that the recurrent task will end to.

4. Save the task.

5. If you want to add a PDF document to the task, you have to save the task first. Then scroll to the bottom of the form to add a document. Simply choose the file (PDF) you want to add using the “Browse” button and click on the green icon on the right to upload the document.



Once your task is completed and saved, you can find it either in the task lists related to the client or in the main dashboard through the alert “Unrealized tasks”.