

Tasks

The Forté CRM Calendar contains a task list. A task is a 'To Do' item such as a follow up call, report, or email, that has a date by which it should be completed. The main difference between a task and an appointment is that an appointment occurs at a specific point in time for a set duration, whereas a task can be undertaken any time, preferably before the specified completion date and time. A task could involve checking if a contact has returned a phone call or sent a document.

Once a task has been completed it can either be marked as complete or be deleted. Use the 'Complete' and 'Delete' buttons in the task list to do this.

Creating a Task

Creating a task is similar to creating an appointment.

A new task can be created in one of the following ways:

- right click on a contact, either in the treeview on the left or in the contact list grid on the right, and select 'Task' from the pop up menu.
- if contact details are displayed, click on the 'Task' button beside their name at the top of the screen.
- select multiple contacts by checking the box beside their name in the contact list grid. Then either right click on one of the selected contacts and select 'Task' from the pop up menu, or click on the 'Action' button at the top of the grid and choose 'Task'.
- select 'New' in the Task List section of the Calendar .

- Subject** Text entered here will appear as the task list entry .
- Type** Choose the type of task from the drop down list. The corresponding icon will be displayed beside the task list entry .
- Account Manager** If the task is being set up for another account manager, clicking on the 'Select' button will bring up a list of account managers to select from.
- Details** Enter further details about the task.
- Due date and time** Enter the date and time that this task should be completed (or started) by . Clicking on the arrow beside the date displays a calendar. Click on the required date to select that date. Date can be set to today's date by clicking the 'Today' button. Time can be entered manually or adjusted using the up and down arrows.

- Reminder** Checking this box will cause a reminder about this task to pop up at the selected time. Select how long before the task due time you would like to receive a reminder. See Reminders for options available in the reminder dialog.
- Add Contact** If the task was created by first selecting a contact or contacts, the name of the contacts will be shown. Other contacts associated with this task can be added by clicking this button. See Linking Tasks to Contacts (below) for more details. The task will be filed against the contact and shown in their activity list.
- Remove Contact** Click this button to remove a selected contact from the list of linked contacts. The task will no longer be filed against this contact.
- Recurrence** If this task occurs on a regular basis, it can be entered in the task list at the required interval by clicking this button. See Recurring Events for details on setting up recurring tasks.
- Delete** Click on this button to delete the task from the task list. A confirmation dialog is displayed. Click Yes to delete the task.

Linking Tasks to Contacts

Tasks can be linked to Contacts by using the 'Add Contact' button when creating or editing a task. A task can be linked to any number of Contacts. Once linked, the task will be shown in the activity list for the contact. Filing appointments and tasks against relevant Contacts, along with documents, notes and emails, provides a comprehensive record of dealings with each Contact.

If the task was created by first selecting a contact or contacts, the names of the contacts will be shown in the list at the bottom of the task screen. If the task was created directly from the task list in the Calendar, no contact names will be shown. Contacts associated with this task can be added, or removed, using the buttons above the list of contact names.

To add a task to a contact's activity list:

- Click on the 'Add Contact' button on the Task screen. The 'Find Contact' screen is displayed.
- If the contact belongs to another account manager, uncheck the 'My Contacts Only' box.
- Enter all or part of the Contact's first name in the box, and click the 'Search' button. A list of contacts matching the search criteria will be displayed.
- Double click on the appropriate Contact to select them, or alternatively click on a Contact and then click Ok.

- Once created, the task will be added to the task list in the Calendar and also to the activity list for the Contact.

To remove a task from a contact's activity list:

- Select the contact from the list of contacts on the Task screen.
- Click the 'Remove Contact' button.
- Click Ok to confirm the deletion.

The task is deleted from the activity list for the Contact, but the task is still shown in the Task List. Deleting a Task will remove the task from the task list and delete it from the activity lists of any contacts it has been filed against.

Editing Tasks

Once a task has been created, its details, including its scheduled completion date and time, can be changed at any time.

An existing task can be edited in one of the following ways:

- Double click on the task in the task list.
- Right click on the task in the task list and select 'Open Task'.
- Double click on the task in a selected Contact's Activity list.

The task details are shown and can be changed as required.

Completed tasks

When a task has been completed, it can be marked as complete. Once marked as complete, the task will show in the task list with a line through it and will no longer appear in reminders.

To mark a task as complete:

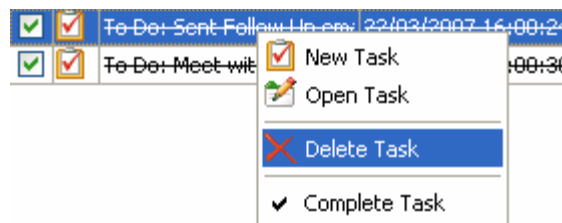
- Click on the 'Complete' button at the top of the task list.
- Right click on the task and select 'Complete Task'.

Deleting Tasks

Tasks, once they have been completed, can be marked as complete. Completed tasks will show in the task list with a line through them, and will remain in the activity lists of linked contacts. Tasks can also be deleted. Once deleted, the task will be completely removed from the task list. The deleted task will also be removed from the activity list of an contact it has been filed against.

A task can be deleted in one of the following ways:

- Right click on the selected task in the task list and select 'Delete Task'.



- Select a task in the task list and click on the Delete button at the top of the task list.



- Double click on the task in the task list. The Edit Task screen is displayed. Click on the Delete button at the bottom of the screen.

A confirmation screen containing a description of the task to be deleted is displayed. Click Yes to delete the task.