

## Company Tasks

To add a Company related Task search the Company using your preferred search method.

Within the Company record click the **Tasks** Tab to expand, then the **New Task** icon (+).



**Jacksonville Property Mgmt - PRIORITY**  
 Jacksonville Property Mgmt  
 2369 1st Street, Suite 300, Contract # 12300-0 PO#456:0, Jacksonville Beach, FL 32250

Detail
Contacts (7)
Work Order Setup
**Tasks**
Correspondence
Documents & Pics (3)
Locations (2)
Referrals
Affiliations

Compliance Templates

Task	Assigned To	Due	Detail	Status	Assigned By	Job #	URL Link
Marketing Drop-off	Marketing Rep	03/26/2021 10:00 AM	WOW basket drop-off to Alisha thanking him for his recent referrals.	Incomplete	Marketing Rep		
Follow-up Visit	Marketing Rep	03/22/2021 12:00 AM	Schedule the next visit with Michael	Complete	Marketing Rep		



Task:  Due:

URL Link:

Detail:

Resolution:

Assign To:  Assigned By: Dawn Bryant Contact: 
 Add new task

Email when task is completed



- Task:** select from the dropdown or manually add the Task (subject). *\*required field*  
*Note: The Administrator of the application can create frequently used Task Types by going to Settings→ System Setup→ Settings→ Other Settings, Task Types*
- Due:** by default, the current date/time will display adjust date/time the Task is expected to be completed by.
- URL Link:** add URL \*include the entire URL (if applicable)
- Detail:** apply the details of the task you would like to have addressed.
- Assign To:** assign the Task to the person that will be responsible to complete the Task. By default, this field populates the name of the person logged in. You can change the Assign To by highlighting the name then begin typing who the task will be assigned to.
- Email when task is completed:** check this box if you would like to receive an email when the assignee has completed the Task. You can also CC two other individuals to receive the completed task email.
- Contact:** if this Task is associated with one of the company contacts select the contact from the dropdown.
- Click **Add Task** icon (📄) to add the Task.

## Company Tasks

### Quick Add Task:

Within the Contacts tab in the Task column single click the **Add Task** icon (+) to quick add a Task.




**Jacksonville Property Mgmt - PRIORITY**  
 Jacksonville Property Mgmt  
 2369 1st Street, Suite 300, Contract # 12300-0 PO#456:0, Jacksonville Beach, FL 32250

Detail Contacts (7) Work Order Setup Tasks Correspondence Documents & Pics (3) Locations (2) Referrals Affiliations  
Compliance Templates

Last Name	First Name	Primary	Secondary	Title	Phone 1	Phone 2	Phone 3	Task	Correspondence	Status
Property Mgmt	Jacksonville	Yes	No					+	+	Active
Atten: Accounts Payable		No	No					+	+	Active
Jasper	Michael	No	No	Property Manager	+1 (904) 000-0000 Cell			+	+	Active
Jaxson	Hunter	No	No	Property Manager	+1 (904) 000-1111 Cell			+	+	Active
Jones	Robin	No	No	Project Manager	+1 (904) 622-9988 Cell			+	+	Active
Kurt	Alisha	No	No	Property Manager	+1 (904) 000-0000 Main			+	+	Active
Levenger	Maxwell	No	No	Property Manager	+1 (904) 111-2222 Cell			+	+	Active



1. The page will redirect and open the new Task in the contact record.  
 Please refer to steps 1-8 on page one (1) to add the new task details.



**Jacksonville Property Mgmt - PRIORITY**  
 Jacksonville Property Mgmt  
 2369 1st Street, Suite 300, Contract # 12300-0 PO#456:0, Jacksonville Beach, FL 32250

Detail Contacts (7) Work Order Setup Tasks Correspondence Documents & Pics (3) Locations (2) Referrals Affiliations  
Compliance Templates

Tasks and Correspondence

Correspondence
Tasks

Task	Assigned To	Due	Detail	Status	Assigned By	Job #	URL Link
No records to display.							

Task:  Due:

URL Link:

Detail:

Resolution:

Assign To:  Contact:

Email when task is completed

General Information

Primary Contact  Secondary Contact  My Contact


First:  MI:  Last:

Title:

Use Same Address as Company  Use Same Address as Territory

Address:

Sales Information



More Marketing Reps

Marketing Rep:



## Company Tasks

**Important:** New functionality added is only applicable to Tasks added on or after 03/29/2021

Tasks now sort by Overdue, Due Today, Next 7, 8-30 Days, Future, then completed. Tasks also display the color within the Due field this is based upon the setup of Task Accountability (Settings → System Setup → Settings → Other Settings, Task Accountability).

[Detail](#)
[Contacts \(7\)](#)
[Work Order Setup](#)
[Tasks \(6\)](#)
[Correspondence \(23\)](#)
[Documents & Pics \(3\)](#)
[Locations \(2\)](#)
[Referrals](#)
[Affiliations](#)

[Compliance Templates](#)

Task	Assigned To	Due	Detail	Status	Assigned By	Job #	URL Link
Follow-up Visit	Marketing Rep	04/22/2021 09:00 AM	Reminder to schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Visit	Marketing Rep	04/25/2021 06:00 PM	Schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Phone Call	Marketing Rep	05/02/2021 04:45 PM	Call Hunter to check in, we haven't received any leads from him.	Incomplete	Dawn Bryant		
Marketing Drop-off	Marketing Rep	05/05/2021 11:00 AM	WOW basket drop-off to Alisha thanking him for his recent referrals.	Incomplete	Dawn Bryant		
Event Reminder	Dawn Bryant	06/03/2021 03:00 PM	Need to drop-off the event flyer regarding the Gold fundraiser.	Incomplete	Dawn Bryant		
Office Visit	Marketing Rep	04/08/2021 10:00 AM	Next visit with Michael	Complete	Dawn Bryant		

### How to complete the Task from the Company

1. Click the **Tasks** Tab
2. Single click the **Task** you'd like to complete
3. **Resolution:** apply the resolution description
4. Click the **Complete** icon (✔)

[Detail](#)
[Contacts \(7\)](#)
[Work Order Setup](#)
[Tasks \(6\)](#)
[Correspondence \(23\)](#)
[Documents & Pics \(3\)](#)
[Locations \(2\)](#)
[Referrals](#)
[Affiliations](#)

[Compliance Templates](#)

Task	Assigned To	Due	Detail	Status	Assigned By	Job #	URL Link
Follow-up Visit	Marketing Rep	04/22/2021 09:00 AM	Reminder to schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Visit	Marketing Rep	04/25/2021 06:00 PM	Schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Phone Call	Marketing Rep	05/02/2021 04:45 PM	Call Hunter to check in, we haven't received any leads from him.	Incomplete	Dawn Bryant		
Marketing Drop-off	Marketing Rep	05/05/2021 11:00 AM	WOW basket drop-off to Alisha thanking him for his recent referrals.	Incomplete	Dawn Bryant		
Event Reminder	Dawn Bryant	06/03/2021 03:00 PM	Need to drop-off the event flyer regarding the Gold fundraiser.	Incomplete	Dawn Bryant		
Office Visit	Marketing Rep	04/08/2021 10:00 AM	Next visit with Michael	Complete	Dawn Bryant		

Task:  Due:

URL Link:

Detail:

Resolution:

Assign To:  Assigned By:  Contact:   Add new task

Email when task is completed





## Company Tasks

### How to complete the Task from the Job and add a new Task

1. Click the **Tasks** Tab
2. Single click the **Task** you'd like to complete
3. **Resolution:** apply the resolution description
4. Check **Add new task**
5. Please refer to steps 1-8 on page one (1) to add the new task details
6. Click **Save & Complete** icon (✔)

Detail
Contacts (7)
Work Order Setup
Tasks (6)
Correspondence (23)
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Compliance Templates

Task	Assigned To	Due	Detail	Status	Assigned By	Job #	URL Link
Follow-up Visit	Marketing Rep	04/22/2021 09:00 AM	Reminder to schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Visit	Marketing Rep	04/25/2021 06:00 PM	Schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Phone Call	Marketing Rep	05/02/2021 04:45 PM	Call Hunter to check in, we haven't received any leads from him.	Incomplete	Dawn Bryant		
Marketing Drop-off	Marketing Rep	05/05/2021 11:00 AM	WOW basket drop-off to Alisha thanking him for his recent referrals.	Incomplete	Dawn Bryant		
Event Reminder	Dawn Bryant	06/03/2021 03:00 PM	Need to drop-off the event flyer regarding the Gold fundraiser.	Incomplete	Dawn Bryant		
Office Visit	Marketing Rep	04/08/2021 10:00 AM	Next visit with Michael	Complete	Dawn Bryant		

Task: Follow-up Visit Due: 4/25/2021 6:00 PM

URL Link:

Detail:

Resolution:

Assign To: Marketing Rep Assigned By: Dawn Bryant Contact: Michael Jasper  Add new task

Email when task is completed

Task: Event Details Due: 5/14/2021 1:00 PM

URL Link:

Detail:

Resolution:

Assign To: Marketing Rep Contact: Michael Jasper

Email when task is completed





## Company Tasks

To print a Task List Summary report click the **Tasks** tab then select the **Printer** icon (🖨️) located to the bottom left of the page.



### Jacksonville Property Mgmt - PRIORITY

Jacksonville Property Mgmt

2369 1st Street, Suite 300, Contract # 12300-0 PO#456:0, Jacksonville Beach, FL 32250

- Detail
  - Contacts (7)
  - Work Order Setup
  - Tasks (6)**
  - Correspondence (23)
  - Documents & Pics (3)
  - Locations (2)
  - Referrals
  - Affiliations
- Compliance Templates

Task	Assigned To	Due	Detail	Status	Assigned By	Job #	URL Link
Follow-up Visit	Marketing Rep	04/22/2021 09:00 AM	Reminder to schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Visit	Marketing Rep	04/25/2021 06:00 PM	Schedule the next visit with Michael	Incomplete	Dawn Bryant		
Follow-up Phone Call	Marketing Rep	05/02/2021 04:45 PM	Call Hunter to check in, we haven't received any leads from him.	Incomplete	Dawn Bryant		
Marketing Drop-off	Marketing Rep	05/05/2021 11:00 AM	WOW basket drop-off to Alisha thanking him for his recent referrals.	Incomplete	Dawn Bryant		
Event Details	Marketing Rep	05/14/2021 01:00 PM	Reminder to send Michael the upcoming event information, once Marketing completes the campaign.	Incomplete	Dawn Bryant		
Event Reminder	Dawn Bryant	06/03/2021 03:00 PM	Need to drop-off the event flyer regarding the Gold fundraiser.	Incomplete	Dawn Bryant		
Office Visit	Marketing Rep	04/08/2021 10:00 AM	Next visit with Michael	Complete	Dawn Bryant		



### Example - Task List Report

Sunshine Restoration  
 7991 Shaffer Parkway, Suite 300  
 St. Petersburg, FL 32250  
 Office: (303) 800-5182 | Toll Free: (800) 000-0000  
 Website: www.sunshinerestoration.com



### Tasks List

04/25/2021

#### 04/22/2021

##### Follow-up Visit

Reminder to schedule the next visit with Michael

Incomplete

Company: Jacksonville Property Mgmt

Assigned By: Dawn Bryant

Contact: Michael Jasper +1 (904) 000-0000 Cell

#### 04/25/2021

##### Follow-up Visit

Schedule the next visit with Michael

Incomplete

Called Michael and scheduled our next appointment/visit

Company: Jacksonville Property Mgmt

Assigned By: Dawn Bryant

Contact: Michael Jasper +1 (904) 000-0000 Cell

#### 05/02/2021

##### Follow-up Phone Call

Call Hunter to check in, we haven't received any leads from him.

Incomplete

Company: Jacksonville Property Mgmt

Assigned By: Dawn Bryant

Contact: Hunter Jaxson +1 (904) 000-1111 Cell

#### 05/05/2021

##### Marketing Drop-off

WOW basket drop-off to Alisha thanking him for his recent referrals.

Incomplete

Company: Jacksonville Property Mgmt

Assigned By: Dawn Bryant

Contact: Alisha Kurt +1 (904) 000-0000 Main