

## Job Tasks

There are three (3) ways to add Tasks to the Job.

- A. Quick Add:** Click Add icon (+) next to Tasks in the Job Header, after selecting the Add icon (+) the Task Tab expands.

Office: Sunshine Restoration

Job Name: Donuts & More... Job #: 21-0503-REM Job Progress **WA/Contract Signed** Loss Type: Remodeling XA Job Type:

---

 Donuts & More... +1 (904) 888-7777 Main  
1662 NE Pine Island Rd, Cape Coral, FL 33909 

---

Tasks: 4 Incomplete: 4 Due Today: 0 Overdue: 4 Future: 0  

Documents: 1

Correspondence: 8 

Work Orders: 1 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0

Equipment: Out: 0 Returned: 1 Total: 1

Referred By: Property Manager  
Source of Referral: Jacksonville Property Mgm (Jacksonville Property Mgmt)

---

Task: Door Confirmation Due: 3/25/2021 11:00 AM  

URL Link: <https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121> 

Detail: Please confirm with the customer this is the style door they want, thanks!

Resolution:

Assign To: Kathleen Mitscher (Restoration M) 

Email when task is completed

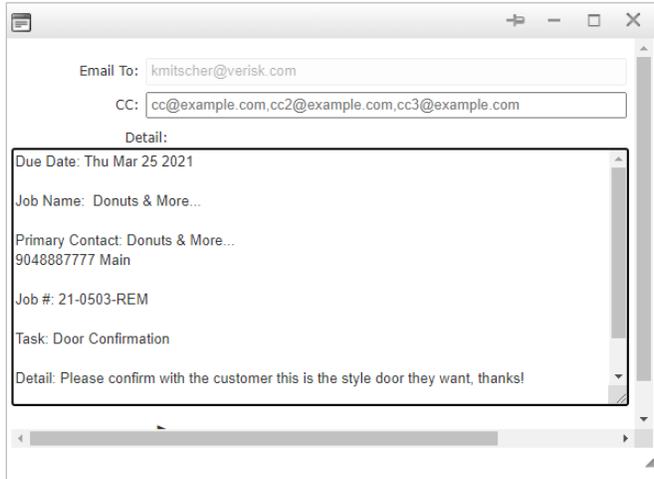
Email Completed Task notification to:  Myself CC: Dawn Bryant CC: Choose an Employee

- 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.
- Quick Email icon** (): click the Quick Email icon if you would like to Email the Task Assignee so they are aware something has been assigned to them.
- Click **Add Task icon** () to add the Task.  
*Note: if you select Quick Email this option will send the email and add the Task.*

## Job Tasks

### Quick Email Preview

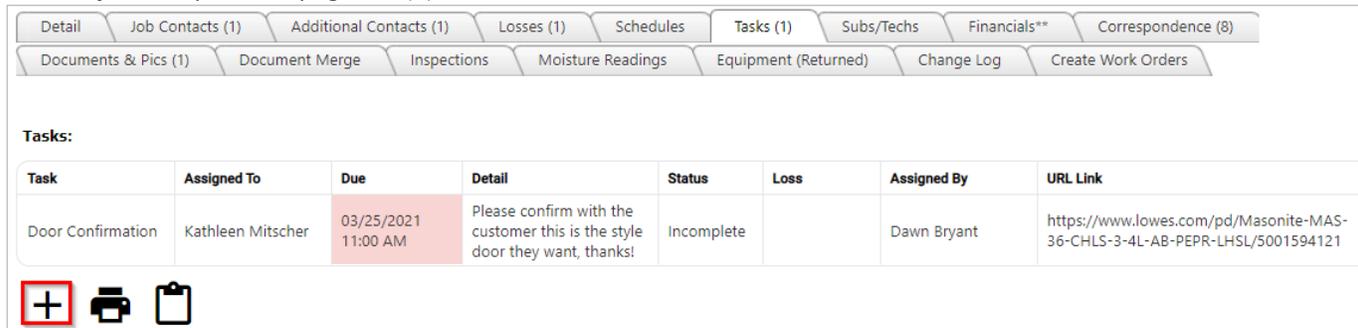


### B. Tasks Tab

Note: The number in parentheses (1) within the Task tab is the total Tasks applied to the job.

- To add a new Task, click New Task icon (+).

Please refer to steps 1-8 on page one (1) to add the new task details.



Detail Job Contacts (1) Additional Contacts (1) Losses (1) Schedules Tasks (1) Subs/Techs Financials\*\* Correspondence (8)  
 Documents & Pics (1) Document Merge Inspections Moisture Readings Equipment (Returned) Change Log Create Work Orders

**Tasks:**

Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Door Confirmation	Kathleen Mitscher	03/25/2021 11:00 AM	Please confirm with the customer this is the style door they want, thanks!	Incomplete		Dawn Bryant	<a href="https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121">https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121</a>

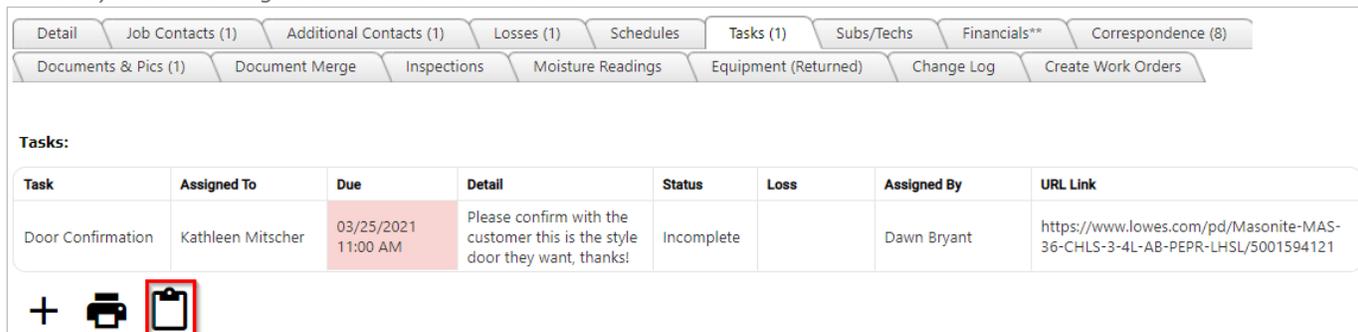




### C. Tasks Tab → Apply Task Template

- To add task at the bottom of the Tasks page select the **Apply Task Template** icon ().

Note: If Task Templates haven't been setup by the Administrator the **Apply Task Template** icon will not display. To setup Task Templates please refer to the following reference document **Task Template - Setup** available on the University under Training Documents → Administrator



Detail Job Contacts (1) Additional Contacts (1) Losses (1) Schedules Tasks (1) Subs/Techs Financials\*\* Correspondence (8)  
 Documents & Pics (1) Document Merge Inspections Moisture Readings Equipment (Returned) Change Log Create Work Orders

**Tasks:**

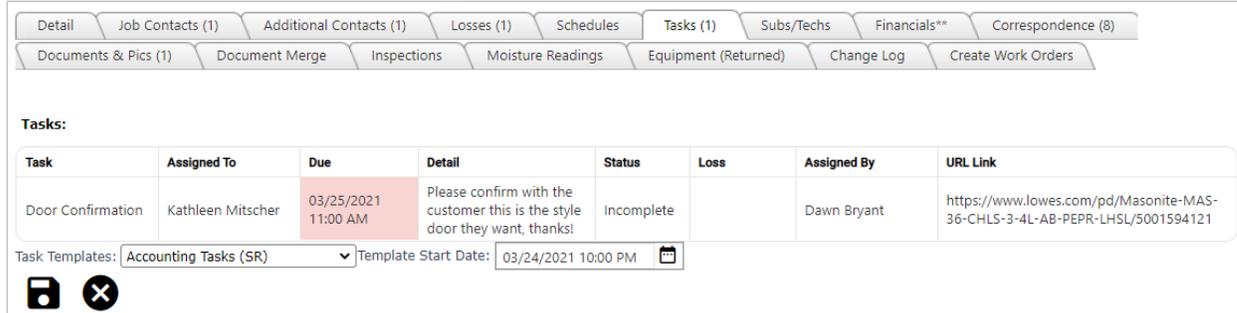
Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Door Confirmation	Kathleen Mitscher	03/25/2021 11:00 AM	Please confirm with the customer this is the style door they want, thanks!	Incomplete		Dawn Bryant	<a href="https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121">https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121</a>





## Job Tasks

2. **Task Templates:** select the Template from the dropdown.
3. **Template Start Date:** apply the date you would like the Tasks to begin from.
4. Click **Create Tasks From Template** icon (📅) to apply the tasks to the Job.



Detail | Job Contacts (1) | Additional Contacts (1) | Losses (1) | Schedules | **Tasks (1)** | Subs/Techs | Financials\*\* | Correspondence (8)

Documents & Pics (1) | Document Merge | Inspections | Moisture Readings | Equipment (Returned) | Change Log | Create Work Orders

**Tasks:**

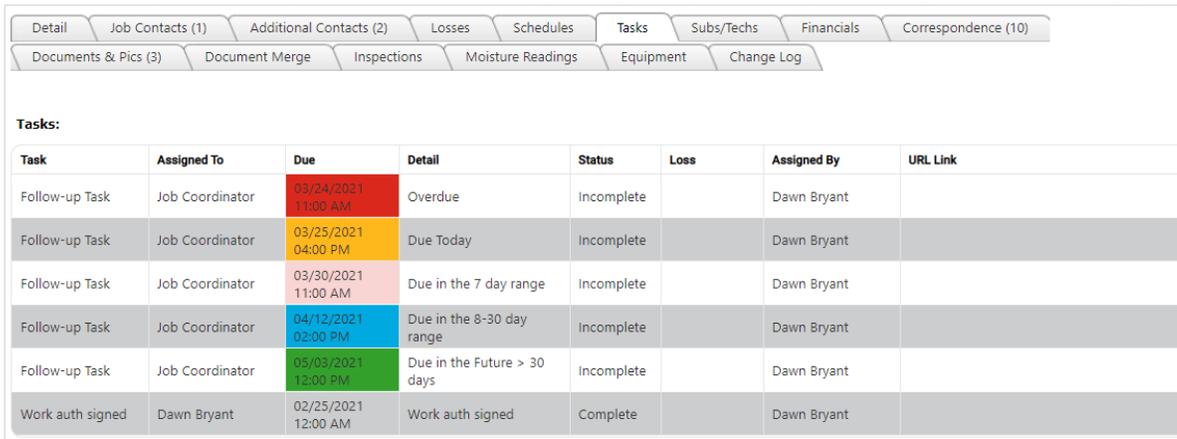
Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Door Confirmation	Kathleen Mitscher	03/25/2021 11:00 AM	Please confirm with the customer this is the style door they want, thanks!	Incomplete		Dawn Bryant	<a href="https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121">https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121</a>

Task Templates: Accounting Tasks (SR) | Template Start Date: 03/24/2021 10:00 PM 📅

📁 🗑️

**Important:** New functionality added that is applicable to any Task 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 | Job Contacts (1) | Additional Contacts (2) | Losses | Schedules | **Tasks** | Subs/Techs | Financials | Correspondence (10)

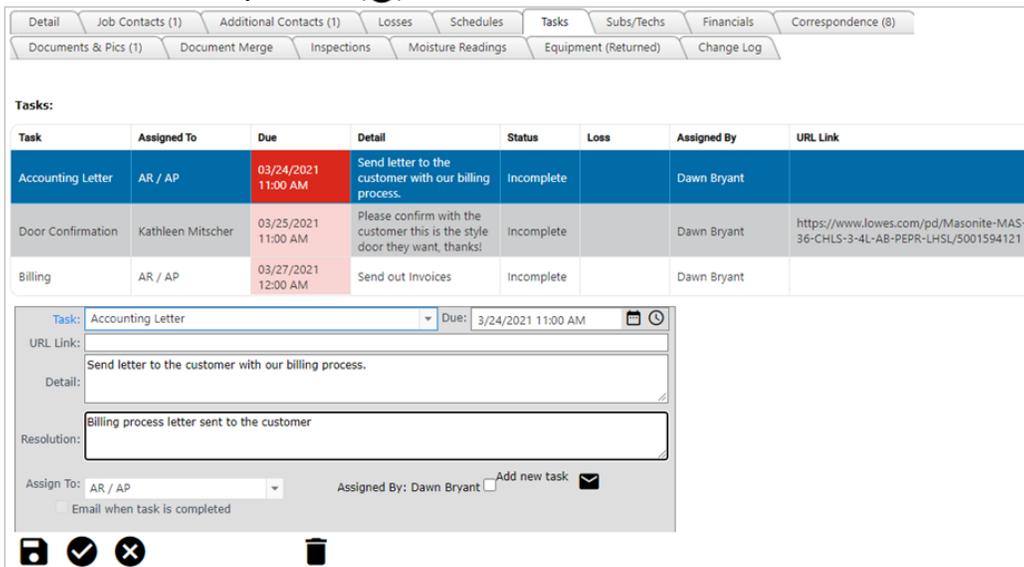
Documents & Pics (3) | Document Merge | Inspections | Moisture Readings | Equipment | Change Log

**Tasks:**

Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Follow-up Task	Job Coordinator	03/24/2021 11:00 AM	Overdue	Incomplete		Dawn Bryant	
Follow-up Task	Job Coordinator	03/25/2021 04:00 PM	Due Today	Incomplete		Dawn Bryant	
Follow-up Task	Job Coordinator	03/30/2021 11:00 AM	Due in the 7 day range	Incomplete		Dawn Bryant	
Follow-up Task	Job Coordinator	04/12/2021 02:00 PM	Due in the 8-30 day range	Incomplete		Dawn Bryant	
Follow-up Task	Job Coordinator	05/03/2021 12:00 PM	Due in the Future > 30 days	Incomplete		Dawn Bryant	
Work auth signed	Dawn Bryant	02/25/2021 12:00 AM	Work auth signed	Complete		Dawn Bryant	

### How to complete the Task from the Job

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 | Job Contacts (1) | Additional Contacts (1) | Losses | Schedules | **Tasks** | Subs/Techs | Financials | Correspondence (8)

Documents & Pics (1) | Document Merge | Inspections | Moisture Readings | Equipment (Returned) | Change Log

**Tasks:**

Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Accounting Letter	AR / AP	03/24/2021 11:00 AM	Send letter to the customer with our billing process.	Incomplete		Dawn Bryant	
Door Confirmation	Kathleen Mitscher	03/25/2021 11:00 AM	Please confirm with the customer this is the style door they want, thanks!	Incomplete		Dawn Bryant	<a href="https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121">https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121</a>
Billing	AR / AP	03/27/2021 12:00 AM	Send out Invoices	Incomplete		Dawn Bryant	

Task: Accounting Letter | Due: 3/24/2021 11:00 AM 📅

URL Link:

Detail:

Resolution:

Assign To: AR / AP | Assigned By: Dawn Bryant | Add new task 📧

Email when task is completed

📁 ✅ 🗑️



## Job 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 Job Contacts (1) Additional Contacts (1) Losses Schedules **Tasks** Subs/Techs Financials Correspondence (8)  
 Documents & Pics (1) Document Merge Inspections Moisture Readings Equipment (Returned) Change Log

**Tasks:**

Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Door Confirmation	Kathleen Mitscher	03/25/2021 11:00 AM	Please confirm with the customer this is the style door they want, thanks!	Incomplete		Dawn Bryant	<a href="https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121">https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121</a>
Billing	AR / AP	03/27/2021 12:00 AM	Send out Invoices	Incomplete		Dawn Bryant	
Accounting Letter	AR / AP	03/24/2021 11:00 AM	Send letter to the customer with our billing process.	Complete		Dawn Bryant	

Task: Accounting Letter Due: 3/24/2021 11:00 AM

URL Link:

Detail:

Resolution:

Assign To: AR / AP Assigned By: Dawn Bryant  Add new task

Email when task is completed

---

Task: Payment Check In Due: 4/5/2021 10:00 AM

URL Link:

Detail:

Resolution:

Assign To: AR / AP  Email when task is completed

Email Completed Task notification to:  Myself CC: Kathleen Mitscher (Restoration N) CC: Choose an Employee

**Tasks:**

Task	Assigned To	Due	Detail	Status	Loss	Assigned By	URL Link
Door Confirmation	Kathleen Mitscher	03/25/2021 11:00 AM	Please confirm with the customer this is the style door they want, thanks!	Incomplete		Dawn Bryant	<a href="https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121">https://www.lowes.com/pd/Masonite-MAS-36-CHLS-3-4L-AB-PEPR-LHSL/5001594121</a>
Billing	AR / AP	03/27/2021 12:00 AM	Send out Invoices	Incomplete		Dawn Bryant	
Payment Check In	AR / AP	04/05/2021 10:00 AM	Confirm payment was received; if not contact the customer.	Incomplete		Dawn Bryant	
Accounting Letter	AR / AP	03/24/2021 11:00 AM	Send letter to the customer with our billing process.	Complete		Dawn Bryant	