TransactionDESK®

App

May 30th, 2017
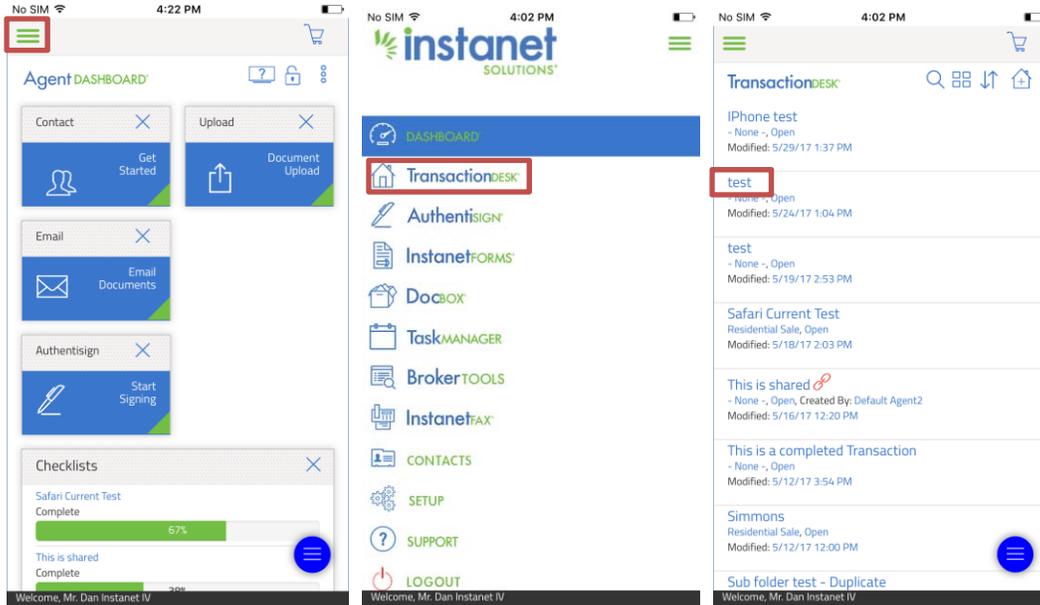
# Managing Tasks
on the App

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Managing Tasks on the App

This is a overview guide of how to create and manage your tasks. You can create a task in a few different places. We will start with the tasks section in your transaction.

- Go to your main transaction page and tap a transaction to open it.

Once you are in the Transaction Dashboard screen, hit the hamburger button in the top right hand corner. Now go to the tasks section.


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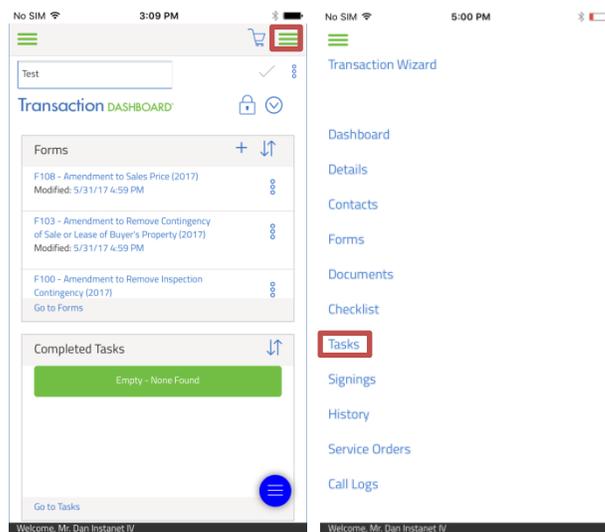
Now that you are in the tasks section of the transaction you can start creating tasks.

- To get started hit the "Add +" icon in the task section to create a new task.
- Go ahead and give the task a name and a description.
- Under the Date/Time section use the drop downs to specify what type of due date to use and how the reminders you want. (You can put no due date, a specific due date, base it off a transaction date if you set one or even base it on the completion date of another task.)
- Lastly choose who else you want to assign the task to that is part of your transaction. And whether you want to notify them of the assigned task and when the status changes on the task.
- You should end up with something similar to the last screenshot once you hit save.
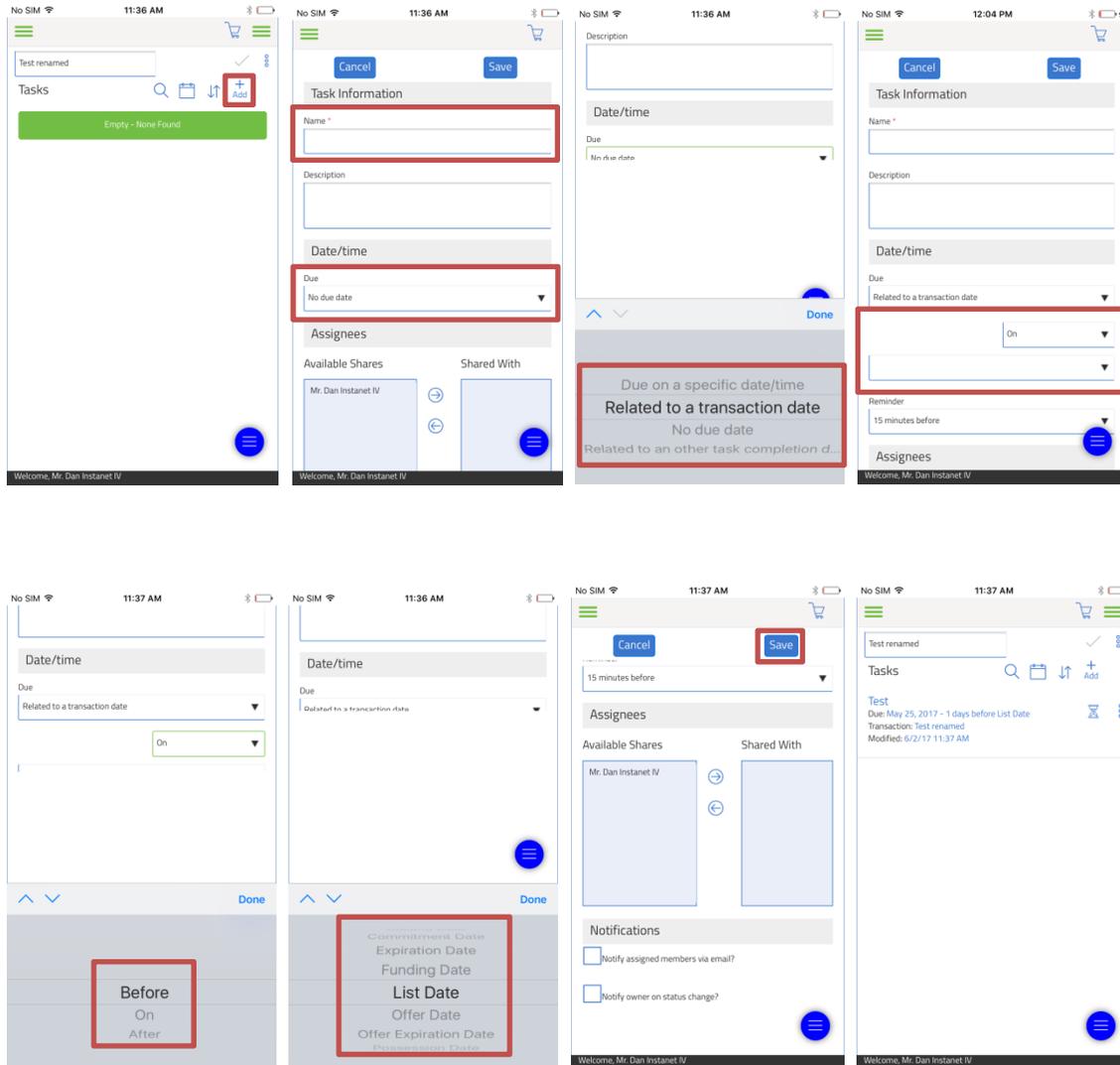
Now that you have your task created there are a few thing you can do to manage your task.

- Looking at the ellipses button next to the task item you can see you have an option for properties, edit and delete. Properties will show screenshot 2. Edit just brings you back to the task editing screen which is identical to creating a new one. Delete will remove the task permanently from your list.
- You also have sort options if you have more then one task, screenshot 3 shows the different sort options available to you.
- You also have a calendar toggle option to go from list view to calendar view as seen in screenshot 4 and 5.
- And finally to complete a task you just need to click the hour glass which will turn it into a green checkered flag.
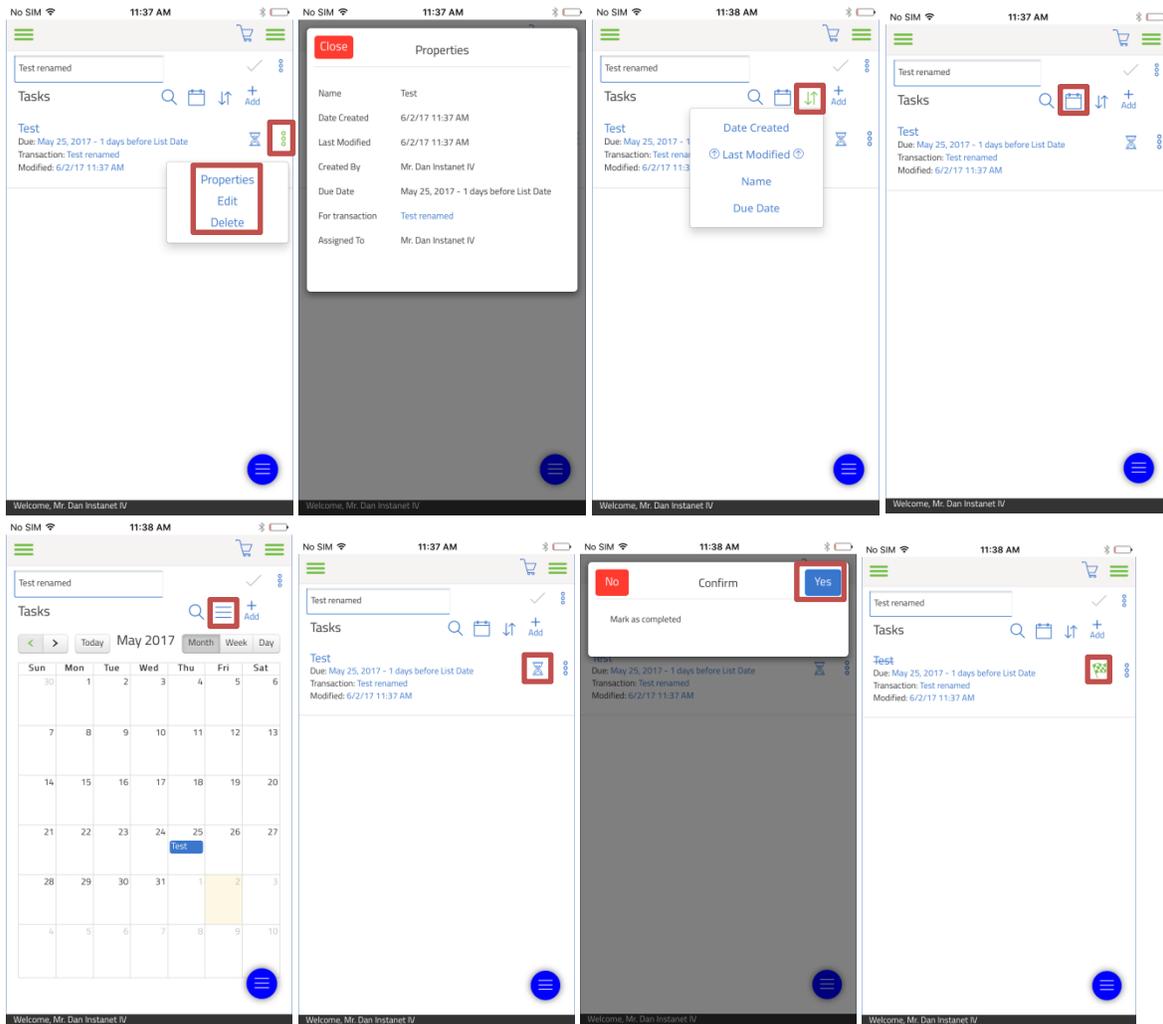
You will also notice that your tasks you create in your transaction will also show in the Transaction Dashboard screen when going into your transaction. That is if you have that specific widget placed on your dashboard.
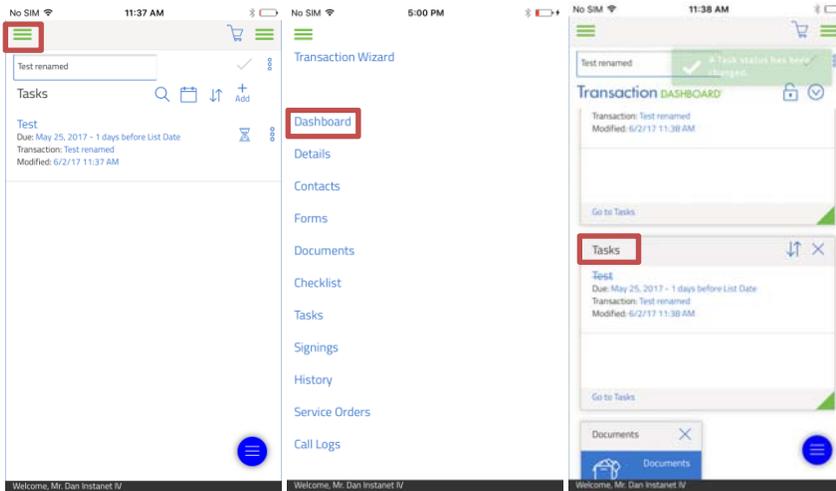
Another way to create a task is directly from the Task Manager section in the left hand menu. Hit the hamburger button on the left this time and hit Task Manager. This will show you a list of all the tasks you have created from all of your transactions. It will show what has been completed or is still due. This screen is very similar to the task section of your transaction and has the same options to create, manage, sort and the toggle button between the calendar view and list view.
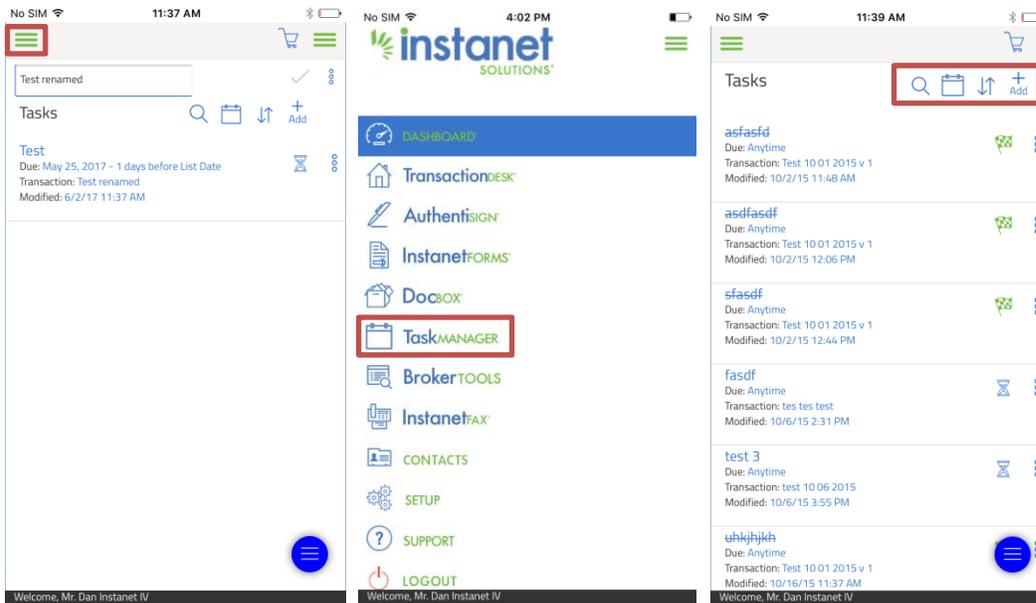
You can also see a list of all of your tasks on your agent dashboard screen. There is a Tasks widget and a Overdue tasks widgets to give you an idea of what is happening. (This is the screen you default on when you log into your account).
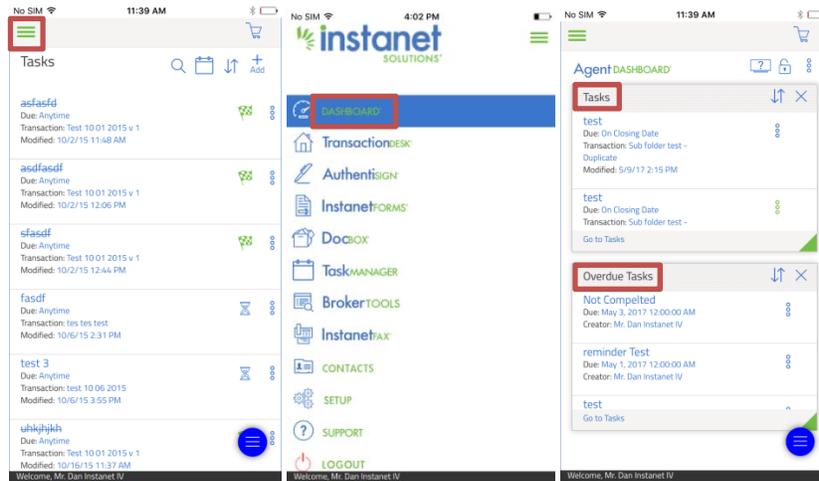
Finally there is one more place you can utlizie in managing your tasks which is to get a daily reminder report of your tasks. Go to the hamburger button on the left to open the left hand menu and then tap setup on the left. This will bring you to the setup options for your account.

- Go ahead and tap program settings and then expand task settings by tapping it.
- Now you can actually set up daily reminders that will send you an email with an overview of what is overdue. Due today or coming up soon.
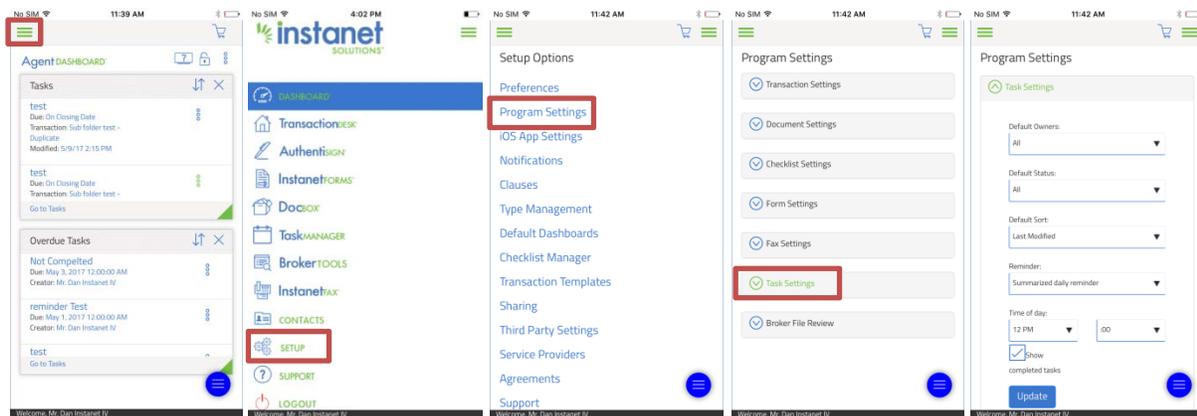
That is all you need to know about creating and managing your tasks.

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