

Using the Task Manager

The Task Manager can be a very beneficial tool and solution for assisting you in managing your daily calendar and tasks. The Task Manager can be found inside WorkCenter under the Schedule Tab.

You can add tasks to your Task Manager in two ways.

The First Method: is to use our scheduling drag and drop technology. To accomplish this, select one of your contact records, single click and hold down your mouse on that contact. Drag the contact into the calendar and you will see a menu screen appear. Select “Task” and choose from one of the options shown. If you do not see the appropriate options, you can select one and then edit it in the pop-up box. You also have the option to create additional tasks using the SETUP OPTIONS and then OPTIONS/LISTS. See the video on: “Setup Options - #3 Adding and Modifying Options Lists Inside WorkCenter”.

The Second Method: Click on the “+” icon located at the bottom of the Task Manager screen. You will notice a screen pop-up; edit the screen and task to meet your needs.

When the Task is completed, you have the option to delete that task or mark it as completed by checking the “completed” box.

See the reports sections regarding how to use the reports pertaining to Calendar scheduled items. You have the ability to filter these calendar-scheduled items by Tasks and other features.