





How to create a Task

Procedure

- 1. To open the task window, click on "Tasks" on the side navigation bar
- 2. Click on "New" on the bar along the top to create a new task
- 3. In the 'Task' window type in the company name in the box on the top left and select the company from the drop down list.
- 4. The contacts for the company will then be displayed below and you then double click on the contact who the task is for.
- 5. Type in all of the information about the task into the 'Subject' and 'Task Details' box
- 6. Select a group by clicking on 'Grp' on the top of the box and select the appropriate group.
- 7. Select a user to assign the task to by clicking on 'Owner' and selecting from the drop down list.
- 8. Click 'Save & Close once to save the task.

