

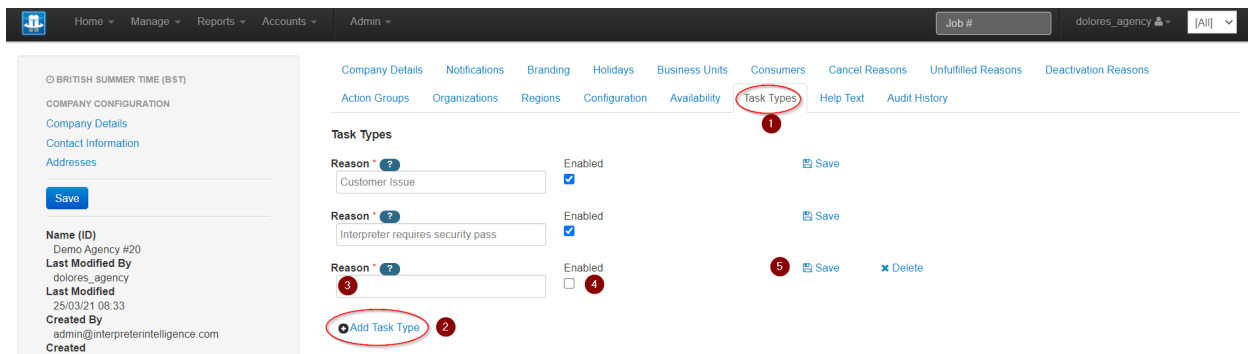
Tasks

Tasks can be used to add and track actions or issues related to **Jobs**. **Tasks** reside at the **Visit** level which means that they can be attached to individual team **Jobs**, or single **Jobs** or individual **Jobs** within a Recurring set. **Tasks** are visible to **Internal** users only and will not be visible to either **Customers** or **Interpreters**.

Task Types

Before using **Tasks** you will need to setup **Task Types**, similar to **Cancel Reasons**, **Unfulfilled Reasons** etc.

- Go to the **'Admin'** menu and select **'Company'**
- Click on the **Task Types** tab
- Click on **Add Task Type**
- Enter the **Reason**, check the **Enabled** box and click **Save**
- In the future if you no longer need to use this **Task Type** you can uncheck the **Enabled** box and click **Save**
- Repeat this process for any additional **Task Types** you wish to enable



Creating Tasks

There are 2 ways to create **Tasks**:

- From the **Manage Jobs** page, click on the dropdown menu next to the appropriate **Job** and select **Add Task**
- From within a **Job**, use the green More button and select **Add Task**

On the **Task** dialog box:

- Select a **Type of Task** at minimum
- You can also enter a **Due Date & Due Time**
- Enter any Notes relevant to the **Task**
- Click the **Save** button

Task



Open * ?



Due Date ?

17/04/21

Due Time ?

09:00

Type of Task * ?

Interpreter requires security pass

Notes

Please organise a security pass for the Interpreter 24hrs in advance of appointment

Save

Close

Managing Tasks

There are 2 ways to manage **Tasks**:

- From the **Dashboard**, select the Tasks tab
 - From here you have a birds eye view of all **Open Tasks** (by default) as well as the **Job ID** any any other relevant information entered on the **Task**
 - If you wish to view all **Tasks**, including **Closed Tasks**, you can use the **Task Status** filter to clear the default **Open** filter
 - **Tasks** that are not yet due, or where no **Due Date/Time** were entered, will appear with a grey flag
 - Tasks that are overdue (where a **Due Date/Time** was entered) will appear with a red flag
 - To take action on a **Task**, simply click on the dropdown menu next to the **Task** and select **Edit** to add more information, or **Close** or **Delete** the **Task**

- From within a **Job**, navigate to the **Tasks** tab
 - From here you will see only **Tasks** attached to the respective **Job**
 - To take action on a **Task**, as per the **Dashboard** view, simply click on the dropdown menu next to the **Task** and select **Edit** to add more information, or **Close** or **Delete** the **Task**

If you require any additional information, please contact support@interpreterintelligence.com