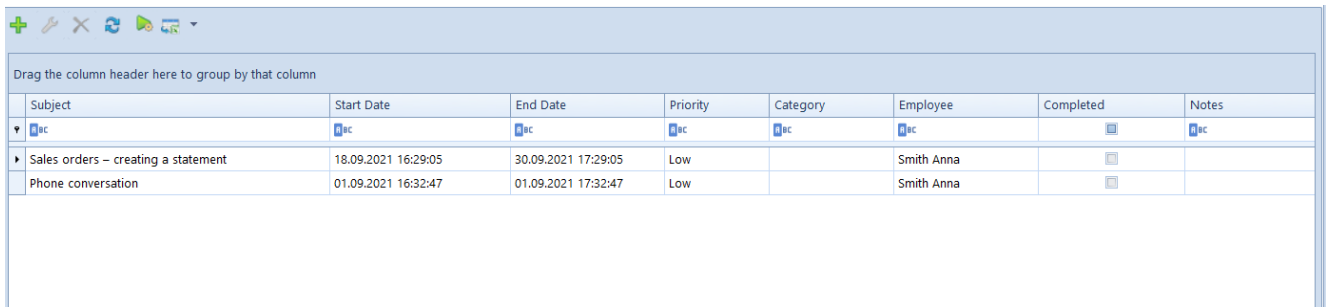


# Tasks

Tasks allow for registering activities and topics assigned to employees, which are automatically saved in their [calendars](#).

The list of tasks is available from the level of *Main* → *CRM* → *Tasks*



Drag the column header here to group by that column							
Subject	Start Date	End Date	Priority	Category	Employee	Completed	Notes
▾ [ec]	[ec]	[ec]	[ec]	[ec]	[ec]	[ec]	[ec]
▸ Sales orders – creating a statement	18.09.2021 16:29:05	30.09.2021 17:29:05	Low		Smith Anna	[ec]	
Phone conversation	01.09.2021 16:32:47	01.09.2021 17:32:47	Low		Smith Anna	[ec]	

## List of tasks

Depending on <<permissions>> granted to an operator, the list presents task assigned to:

- **currently logged-in employee**
- **all employees**
- **employees in child centers**

## Example

In the database, operator Anna Smith was defined, who belongs to the following operator groups:

- *FA\_Department*
- *B2\_default*

1. The operator is assigned to the *Financial and Accounting Department* unit from the level of *Subordination Structure*.
  - The following permission was granted to the *FA\_Department* group: *Tasks of employees in child centers*.

2. The operator opens the list of tasks *CRM -> My Activities*. The list presents meetings created by employees of:

- *Financial and Accounting Department*
- *Financial Department*
- *Accounting Department*

The possibility of modifying lists of tasks of other employees depends on activating of permission *CRM – Modification of tasks*. It allows for applying changes to tasks of operators who are not authors or performers of activities.

#### Note

If the permission to modify the list of tasks is not granted, while the permission to display the list of tasks of co-workers/all employees is granted, it is still possible to preview such tasks.

In order to add new task, it is necessary to click on button **[Add]**. The form is composed of the following tabs: *General, Execution, Attributes, Attachments* and *Change History*.

In order to save a new task, it is mandatory to fill in *Subject* field.

In section *Scheduling Details*, it is possible to specify effective dates of a given task, mark it as an all-day event or create an analogical task to execute (parameter *Set another task in*).

In the tab *Execution*, an employee associated with a currently logged-in operator is displayed. An operator with granted permission to see lists of tasks of other employees can assign a given task to another employee.

General Execution Attributes Attachments Change History

Task

Subject: Phone conversation  Completed

Venue:  Priority: Low Category:

Notes:

Scheduling Details

Start Date: 01.09.2021 16:32:47  All day event

End Date: 01.09.2021 17:32:47  Set another task in 1 weeks

Task form

Note

Only one employee can be assigned to each task.

---

# Calendar

Calendar allows for easy managing of *tasks*, *questionnaires* and *CRM activities*. Thanks to the calendar form, employees can quickly preview tasks assigned to them and managers are able to supervise work of employees.

Depending on <<permissions>> granted to operators, in a calendar it is possible to:

- preview and manage tasks, activities and questionnaires assigned to a logged-in user and of:
  - *all employees*
  - *co-workers*, that is employees assigned to the same

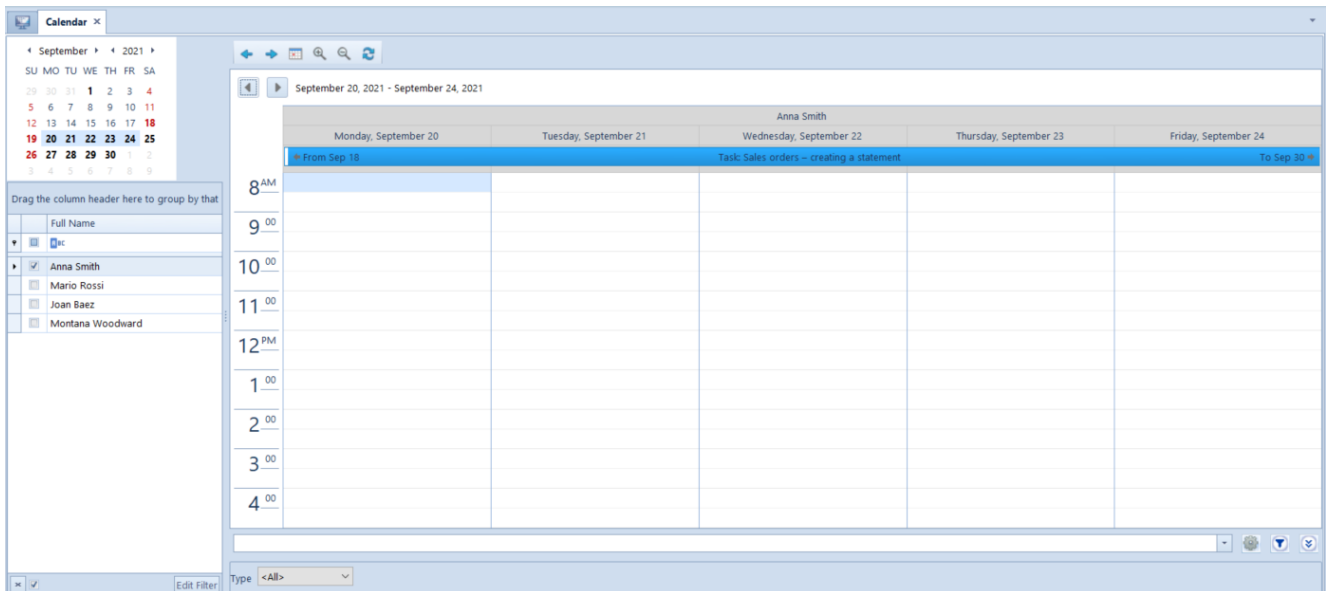
- unit
- *co-workers* and employees assigned to child units of that unit
- modify own activities and tasks and those of other employees

### Example

1. Operator *Anna Smith* belongs to a group of operators with granted permission *CRM* -> *Calendars of employees in child centers*. In the subordinated structure, *Anna Smith* is assigned to *Finance and Accounting Department* center.
2. In employees sections, calendars of all employees belonging to the following departments are available:
  - *Financial and Accounting Department*
  - *Financial Department*
  - *Accounting Department*

Calendar can be presented in the following modes:

- *Daily*
- *Working Days*
- *Week*
- *Month*
- *Timeline View*



## Calendar

Depending on the type of an object added to the calendar, such object is marked in a color dedicated to it. Objects with ended/confirmed status are additionally marked in red.

For operators with granted permission to display activities of other employees on the side panel, the system presents a list of persons to whose calendars the currently logged-in operator has access.

From the level of a calendar, the operator can also add new tasks, contacts and meetings.

Upon selecting [**Add**] button, a form of a given object appears on the ribbon. Defining of new <<activities>> is described in article.