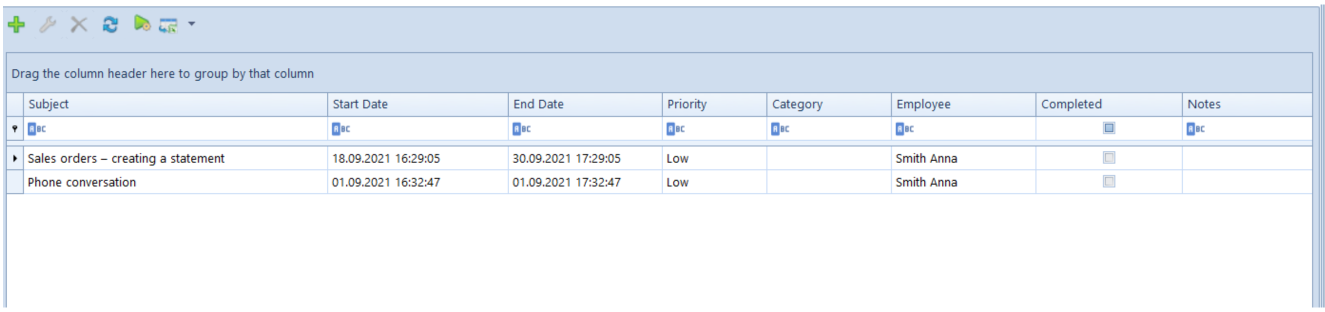
Tasks

Tasks allow for registering activties 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*



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*

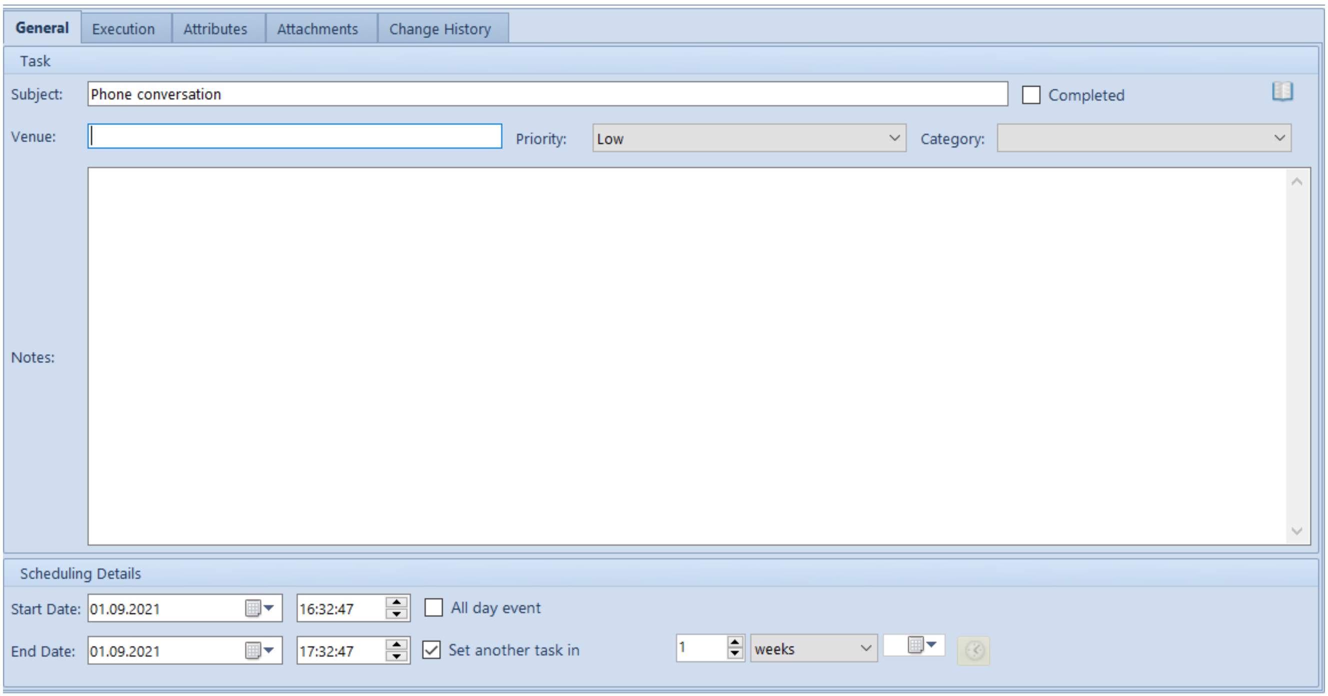
The possibility of modifying lists of tasks of other employees depends on activating of permission *CRM – Modification of tasks.* It allows for applying changes to tasks of operators who are not authors or performers of activities.

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 taks, 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 emplyee.



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

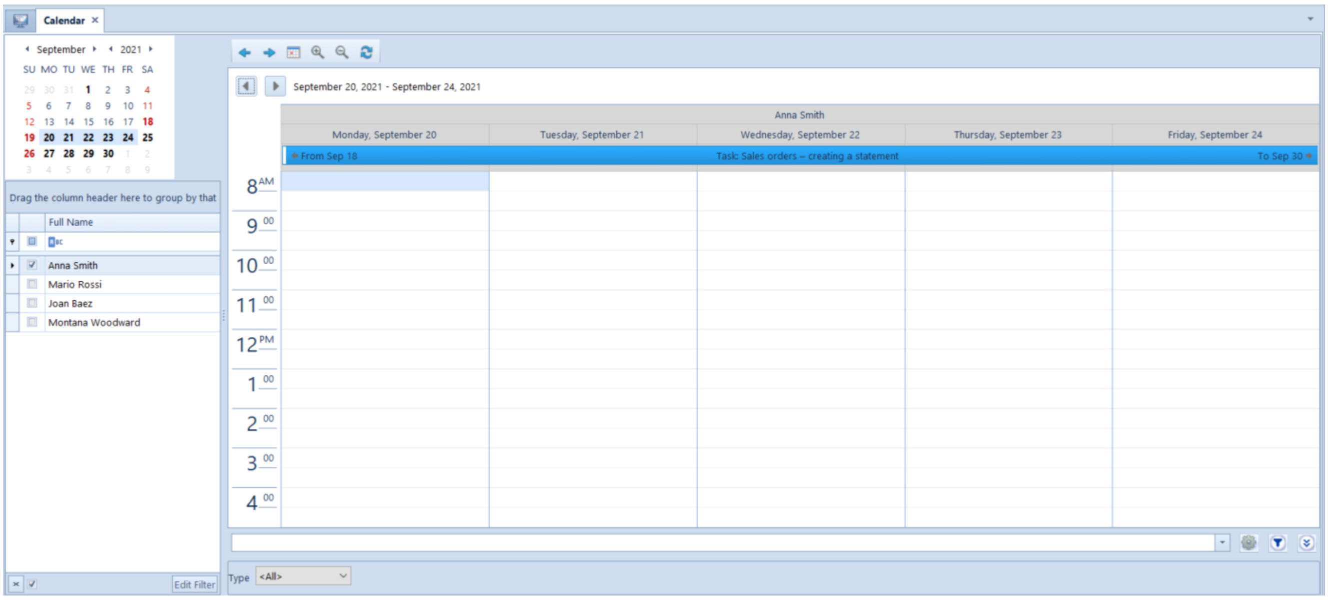
Example

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.