



# Tasks

Help Documentation

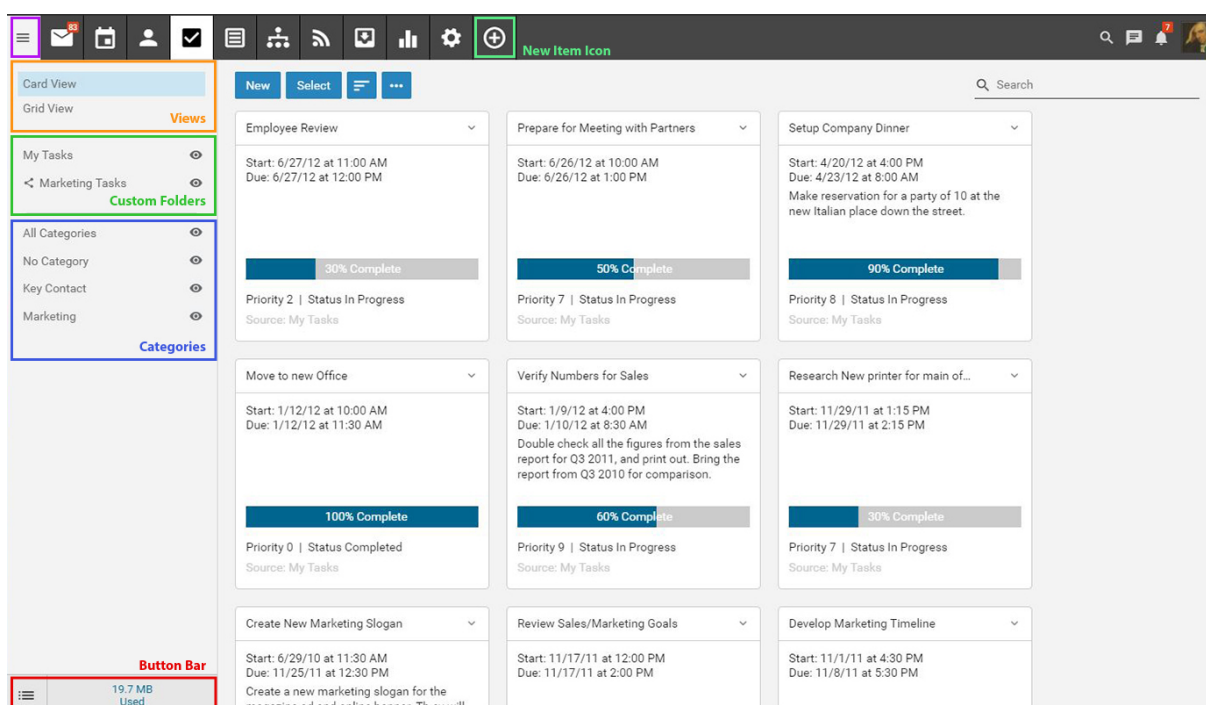
# Tasks

## Tasks Overview

SmarterMail's robust task system is designed to help users keep track of the things they need to do. From shopping lists to long-term tasks, users can create lists of items, set due dates, update status and completion percentage, and even prioritize tasks. And, as there are times when an email exchange leads to a task needing to be done, email messages can be the starting point for, or linked to, tasks so that all communication surrounding the task is kept organized.

To access your tasks, click the Tasks icon . By default, the My Tasks source is displayed. (Though there may not be any tasks listed, just yet.) If other task sources are being shared with you, they will appear beneath My Tasks once they've been mapped. (see Mapped Resources for more information on sharing resources.) Making multiple task sources visible will display all of the tasks, from each source, together in the All Tasks view.

To help you understand the different areas of the Tasks section of SmarterMail, we created a simple interface diagram that labels various features and viewing areas.(click for larger image)



## Navigating Your Tasks

### Burger Icon

At the top of the folders view you'll see the Burger icon. This allows you to hide or show the tree view, which is extremely beneficial when viewing your inbox on smaller devices.

## Task Views

In general, the Tasks page is divided into two sections:

- The Tasks view displays all of your task sources and any Categories that have been created. This includes "My Tasks", which are tasks you add to SmarterMail, and any sources that other users have shared with you.
- Individual cards that represent every task you have displayed.

### All Tasks View

When you view your tasks, each task you have created or that's being shared with you will be listed on a separate card. Each card lists the following information, which is described in detail further down this page:

- Task Subject - This is the descriptive title of the task, such as "Fill out mortgage paperwork" or "Review New Website Content"
- Description - These are the details of the task. Using the HTML editor, a task's details can include bold text, lists, different fonts or fonts with different colors, pictures, links to websites or videos and more. You can as creative as you like
- Source - This tells you where the task came from> E.g., My Tasks or a shared task list.
- Start - The date and time the task is set to begin.
- Due - The date and time the task should be completed.
- Reminder - If you want a reminder notification to be sent when a task is about to End, select it from this dropdown.
- Priority - This allows you to set a level of importance for each task. A priority makes it much easier to sort tasks based on how important it is to complete those tasks.
- Status - Generally, these are:
  - Canceled - The task was created, but it was eventually decided it wasn't necessary.
  - Not Started - The task was created -- perhaps more information is needed or it's dependent on a task from another user -- so it hasn't been started yet.
  - Completed - The task is finished.
  - In Progress - The task is currently being worked on.
  - % Complete - This allows you to periodically update where you are in terms of completing the task. This is especially helpful if the task is being shared with others within your organization. As an aside, once a task hits 100%, it's "Status" will automatically change to "Completed". Conversely, if a task was set to 100% and, therefore, Completed, if the Completion Percentage changes to less than 100%, the Status of the task automatically changes to "In Progress".

In general, the following options are available from the All Tasks view:

- New - Creates a new task.
- Select - Allows you to select more than 1 task at a time. To select multiple tasks, click Select and then click on one or more cards. To exit Select mode, click the Select button again. To de-select a task, simply click on it again. Alternatively, click the down arrow and you're presented with the following options:
  - Select All - Selects all tasks in the list you are viewing.
  - Deselect All - Deselects the selected task(s).
  - Delete - Deletes the selected tasks. NOTE: You can also use the Delete key on your keyboard.
  - Sorting menu - Clicking the Sorting menu brings up the following options:
    - Subject - The name/title of the task.
    - Due Date - The date the task is due to be completed.
    - % Complete - How far along the task is in terms of meeting its deadline.
    - Priority - The importance of the task.
    - Ascending - Sort order placing the items that are most active/recent/important first.
    - Descending - Sort order placing the items that are least active/recent/important first.
    - Not Started - Status noting that the task has yet to be started.
    - In Progress - Status noting that the task is currently being worked on.
    - Completed - Status noting that the task is finished.
    - Canceled - Status noting that the task was canceled and will not be worked on.
    - Actions (...) menu - Connects SmarterMail to Microsoft Outlook and synchronizes task information. Note: This feature is only available in SmarterMail Enterprise.

## Tasks and Calendars

As tasks generally have a timeframe associated with them, you can choose to have your tasks displayed in your calendar, just as you do other events. You can opt to have the start time and/or the end times displayed. To manage this, go to your User Settings and open up Calendar Settings . On the Options card, you can toggle "Display task start times in the calendar view" and/or "Display task due times in the calendar view" to turn these on or off. As with any other calendar event, task start times and end times both trigger any notification you have set for the task.

## Creating a Task

Starting a new task is extremely easy: simply click the New button in the All Messages view. Once you do this, you'll be able to start entering your task details. These include:

**Subject** - This is the simple name for the task, like "Create new blog post" or "Organize meeting notes".

**Task Description** - This is where you enter more details about the task. For example, a copy of any meeting notes or general notes necessary for the completion of the task. These can be updated at any time. Editing the description and keeping additional notes there is especially beneficial when participating in shared tasks. In addition, the task description area is fully HTML compliant with a rich editor so it's possible to stylize the description with different fonts and colors, links to outside resources, etc.

Then there are the Task Details , which include:

- **Source** - Where the task is kept. By default, new tasks are stored within My Tasks, but if you have shared tasks with others, you can save a task there as well so the person you're sharing with can keep track of the task's status.
- **Start** - The date and time the task is supposed to start. Both areas have quick-select icons for setting the date as well as the time, but you can manually enter this information as well.
- **Due** - The date and time the task is due. Again, both areas have quick-select icons for setting the date as well as the time, but you can manually enter this information as well.
- **Reminder** - If you want to be reminded prior to the Start Date/Time
- **Priority** - Priorities help you keep abreast of important tasks and helping you organize your time. Important tasks, obviously, would take a higher priority whereas daily or monthly tasks may carry less weight. 0 priority would have less importance whereas 10 tasks would have the highest priority.
- **Status** - The status of a task reminds you, and others if sharing tasks, where the task is in terms of its progress towards the due date.
- **% Complete** - Adding a % Complete further lets you, and others if sharing tasks, how far along the task is in terms of meeting the due date.

Finally, there are Categories . Just like within Contacts and other areas of SmarterTools, it's possible to add one or more categories to tasks. Adding categories is a great way to keep tasks organized.

## **Editing a Task**

To edit a task, simply click on the card of the task you want to modify. Once opened, you'll be able to edit any area of the task. Editing tasks is important, especially when tasks are shared with others, to add new notes, adjust due dates and % complete and more.

## Tasks and Calendars

Depending on whether you have your calendar set up to display the start and/or end times for tasks, once the task is saved, it will appear on your calendar. Note: For more information, see [Calendar Settings](#) .

## Searching Tasks

If you have a large number of tasks in your tasks list, finding a specific task can become increasingly difficult. Fortunately, SmarterMail's basic search tool allows users to find tasks quickly and easily.

To perform a basic search, type the search criteria in the search bar located near the top of the All Tasks view. Then click the magnifying glass or press Enter on your keyboard. SmarterMail will automatically search the tasks list you are viewing for matches and display the results in the navigation pane. Note: Your search criteria may include letters and numbers. SmarterMail does not search for special characters such as "@," "#" or "%."