



# Tasks

Help Documentation

# Tasks

## Tasks Overview

SmarterMail's robust tasks system is designed to help users keep track of anything 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 linked to tasks so that all communication surrounding the task is kept organized.

To access your tasks, click the Tasks icon . To view different Tasks lists (such as shared lists or mapped resources), use the Tasks Selector at the top of the navigation pane and select the list you want to view. Depending on your overlay settings found in the View menu, you can view multiple lists together or toggle between views.

For help understanding the different areas of the tasks section, see the tasks interface diagram .

## Navigating Your Tasks

When you view your tasks, the page is divided into two sections:

- The navigation pane displays the tasks in the list you are viewing. To view details for a specific task, simply click the desired task.
- The content pane displays all available details about the selected task.

In general, the following options are available from the navigation pane toolbar:

- New - Creates a new task.
- Actions - Click this button and select the appropriate option to select all tasks, delete tasks, or add the tasks to Outlook.
- Select All - Selects all tasks in the list you are viewing.
- Delete - Deletes the selected task(s).
- Add to Outlook - Connects SmarterMail to Microsoft Outlook and synchronizes task information. Note: This feature is only available in SmarterMail Enterprise.
- View - Click this button and select the appropriate option to filter tasks, sort tasks, or choose the details that are displayed about a task in the navigation pane.
- Filter - Filters tasks by the selected category or by whether the task is completed.
- Sort - Sorts tasks by subject, due date, percentage complete, or priority level in ascending or descending order.

- Visible Fields - Choose which task details are displayed in the navigation pane.
- Overlay Tasks - When unchecked, adjusting the Tasks Selector will toggle views rather than overlaying tasks to view multiple lists at one time.

In general, the following options are available from the content pane toolbar:

- Edit - Edits the selected task.
- Delete - Deletes the selected task.

## Creating New Tasks

To create a new task, click New in the navigation pane toolbar. This will open a new task window that you will use to add the task to SmarterMail.

### Saving Task Details

When you add a new task in SmarterMail, you can save as much or as few details about the task as you like. In general, task details are divided into three sections:

- Details - The details of the task include the subject of the tasks, start and end dates, and other information. Note: The subject, start date and due date are the only required fields to save a task.
- Account - This option is used to select the account the task should be created under. This includes the default task list and any shared resources that have been mapped to the user's account.
- Subject - This is a friendly name for the task. A more detailed description of the task can be added in the next tab.
- Start and End Dates and Times - The date and time the task will begin, then end. You can either manually enter the dates and times or click on the date selector icon and/or the time selector icon.
- Reminder - Setting a reminder will make a pop-up window appear in webmail at whatever reminder interval you set.
- Priority - Setting a priority helps you keep tasks organized by importance.
- Status - The status of the task keeps you, and anyone else you may be sharing tasks with, apprised of where the task is in terms of being worked on. Options include:
  - Not Started - The task is created but not being worked on at the present time.
  - In Progress - The task is currently active and being worked on.
  - Completed - The task was worked on and is now finished.
  - Canceled - The task is not needed, is not worth starting or a decision was made to not move forward with it.

- % Complete - As a task is being worked on, a user can update the status by denoting how far along the task is in terms of being marked Completed. This is a good way to keep people who share tasks apprised of where the task is in terms of completion.
  - Description - The description field can be used to type up the initial thoughts/ideas or goals of the task, then updated as needed with any important notes, if desired, as the task is worked on.
  - Categories - A category provides a way to organize your notes into manageable groups. To add a category, simply click the Master Categories button and type the new category name.
- Note: Be sure to separate categories with a comma.

Once the task is saved, it will appear on your calendar. Note: Users can disable the display of task start and end times on the calendar. 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 navigation pane. 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 "%."

To search other areas of your SmarterMail mailbox, use the advanced search feature. For more information, see [Advanced Search Overview](#) .