



Creating New Tasks

Help Documentation

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](#) .