



# Tasks

Help Documentation

# Tasks

## Task List Overview

SmarterMail allows you to store all of your tasks in a single place, accessible from the web wherever you are. Tasks can be used to store to-do's or important checklists. Some features of SmarterMail tasks are:

- Configurable start and due times.
- Reminders that show up in SmarterMail to alert you of the task due date.
- Completion status that tracks the percent done of the task.

To get started, click the Collaborate button on the main toolbar, and then select the Task control bar in the left side bar.

## Manage Tasks

The My Tasks page lists all of your tasks in one place and lets you sort and track them easily. To view your tasks, click the Collaborate button on the main toolbar, then click the Tasks control bar, and finally select All Tasks from the My Tasks tree view.

The My Tasks page lists all of your tasks and lets you perform many actions:

- Editing a Task - Click on the subject of a task to edit it.
- Select the task you want to edit and click the Edit icon from the actions toolbar; or
- Right click the task you want to edit and select Edit from the drop down list; or
- Double-click the task you want to edit
- Deleting a Task - This can be accomplished two different ways:
  - Select the task you want to delete and click the Delete icon from the actions toolbar; or
  - Right click the task you want to delete and select Delete from the drop down list
- Sharing Tasks with Other Users (Enterprise Edition Only) - For information about sharing, please see the topic [Sharing Your Own Resources](#) .
- Searching Tasks - Click on the Search button to begin searching for tasks. A second bar will appear that will allow you to search.

## Create a New Task

To add a task to your task list, either click on New Task in the tree view on the left hand side, or click the New icon on the actions toolbar

If you wish to add a task to a shared task list (Enterprise Edition Only) , you must be viewing the list, then use the New icon from within the page.

## Details

- Subject - This is the short description of the task, and is what will appear on task pages and reminders.
- Date and Time - Enter the start date and time of the task, as well as the due date of the task. You may leave the due date or time blank to indicate that there is no due date.
- Reminder - If you wish to have a reminder appear in SmarterMail, choose the amount of time beforehand that you want it to show.
- Priority - Higher priority tasks are more important. In My Tasks, you can sort by priority.
- Status - Choose the status of the task. This will show up in My Tasks so that you can easily track the status of your items.
- % Complete - This indicates the percentage that the task is completed.

## Description

Enter the full description of the task, if needed.

## Categories

You may assign one or more categories to each note to make for easier searching.

- To add a new category, click the Master Categories icon from the actions toolbar. Then list the categories you would like to add, one per line.

## Outlook Integration

### SmarterMail Sync

SmarterMail Sync is an on-demand synchronization tool. After installing it, a toolbar will be added to your copy of Microsoft Outlook that will allow you to easily synchronize with SmarterMail whenever you need. [More Info on SmarterMail Sync](#).

### Sharing

Sharing a resource, such as a calendar, contacts, notes, tasks, or e-mail folders, will allow the users you specify to access the resource with a pre-determined permission level. [More Info on Shared resources](#).