



# Tasks

Help Documentation

# Tasks

## Tasks Overview

SmarterMail's tasks feature is designed to help users keep track of things they need to do. Users can create lists of items, set due dates, and even link email messages to tasks.

To access your tasks, click the tasks icon . By default, the tasks in My Tasks will load. Note: To view different task lists (such as shared lists or mapped resources), click the Tasks menu at the top of the navigation pane and select the desired list.

For help understanding the different areas of the tasks section, see the tasks 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 - Click this button and select the appropriate option to create a new message, contact, appointment, task, or note.
- 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.

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 and then click New Task . This will open a new task window that you will use to add the task to SmarterMail.

- Save - Saves the task details.
- Master Categories - A category provides a way to organize your tasks 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. --%>

## 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 - Type the subject of the task and specify the task's start date and time, due date and time, priority level, status, and the percentage of the task that is completed. You can also configure a reminder that will display in webmail prior to due date and time. Note: The subject, start date and due date are the only required fields to save a task.
- Description - Type any important notes or a description of the task, if desired.
- 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](#).

- Subject - The name of the appointment. Make sure the subject is descriptive, as it will display on task reminders and on your calendar.
- 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.
- Start - Type the task's start date and time or use the calendar and clock icons to select the date and time.
- Due - Type the task's due date and time or use the calendar and clock icons to select the date and time.
- Reminder - To receive a reminder prior to the due date, select the appropriate option from the list. By default, the reminder will appear as a popup in the SmarterMail interface, so if you are

not logged in to webmail, you will not receive the reminder.

- Priority - Select the priority level of the task from the list. Higher priority tasks are considered more important.
- Status - Select the status of the task.
- % Complete - The percentage of the task that is completed.

## Description

Use this tab to record any important notes or a description of the task, if desired.

## Categories

A category provides a way to organize your tasks into manageable groups. Use this tab to assign the task to a category, if desired. --%>

## 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.

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