



# Tasks

Help Documentation

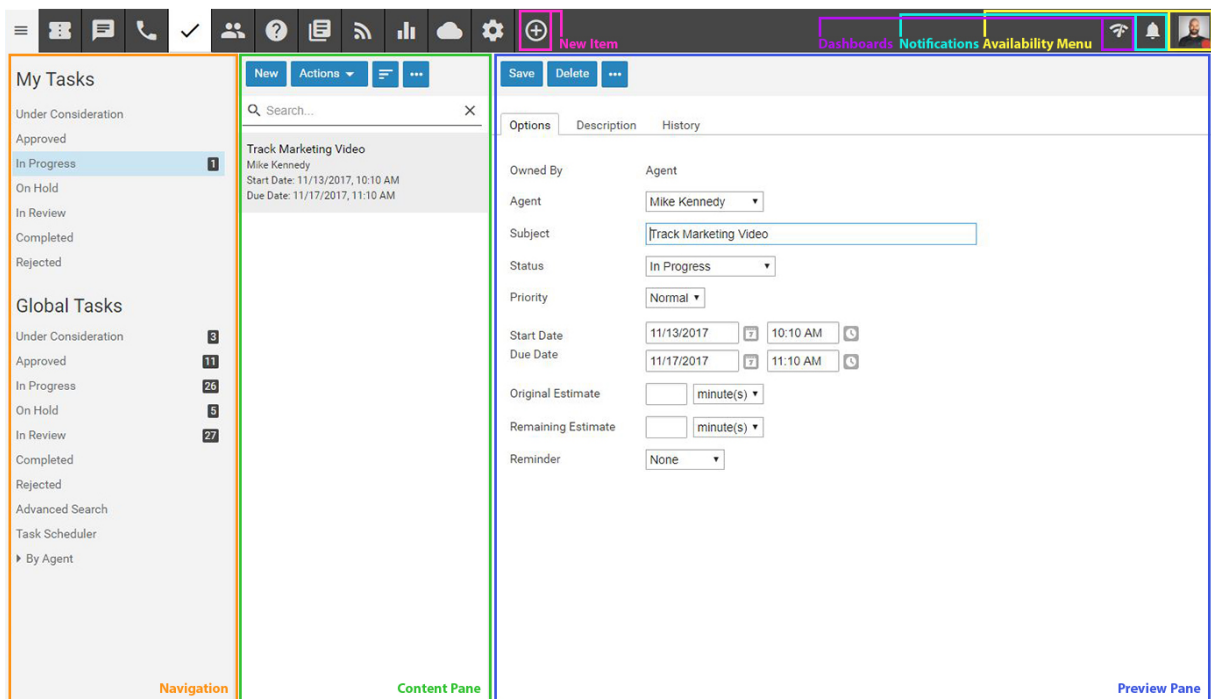
# Tasks

## Tasks Overview

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. Agents can create new tasks to organize their time, assign tasks to other agents and schedule tasks that regularly take place. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to create new tasks directly from any ticket, live chat, and call log in the system. These tasks are added as a Related Item on the corresponding ticket, live chat or call log and can also be reviewed in the Tasks section. This ensures agents can have all the information necessary to complete their tasks in one convenient location and better track the communications related to those tasks.

To access your tasks, log into the management interface with an agent account. Then click on the Tasks icon . The In Progress tasks that are assigned to you will load in the content pane. To view your other tasks, select the appropriate status from the My Tasks section of navigation pane. Agents who are also assigned the Manager role can review tasks assigned to other agents in the Global Tasks section of the navigation pane.

To better understand the different areas of tasks, please refer to the diagram below:



## Navigating SmarterTrack's Tasks Interface

### My Tasks vs. Global Tasks

The My Tasks section displays tasks by their current status for a particular agent. Clicking on a status displays all of the tasks with that status in the content pane. Agents can click on a task and review its details in the preview pane or open a task in a new pop-up window by double clicking on it.

Based on their role permissions, administrators and managers have the ability to review all tasks in SmarterTrack, either by status or by agent. In the Global Tasks section of the navigation pane, clicking on a status displays all tasks with that status in the content pane, regardless of the agent it's assigned to. Expanding the By Agent tree menu displays all agents the administrator and/or manager has permission to view, and each agent has task status categories listed for review.

Regardless of whether you're accessing My Tasks or Global Tasks, all tasks in the system will load in the content pane when you open the respective task status. In general, the following details will be available:

- Subject - An agent-generated phrase that usually describes the task. Very long subject phrases are truncated.
- Owner - Indicates the owner of the task, either a specific agent or a related item. (E.g., a ticket, live chat or call log)
- Start Date - The date and time the agent should begin the task.
- Due Date - The date and time the agent should complete the task by.

### Sorting

Use the Sort button in the content pane toolbar to sort the list of tasks in either ascending or descending order. Final sort order uses the task's due date as the deciding factor. For example, 10 tasks with the same owner will sort from the closest due date to the furthest when sorting the Owner column in either ascending or descending order. In terms of sorting by Status, tasks sort from left to right, meaning they sort by status then the task's priority (or vice versa, depending on an ascending or descending sort order). Even in this scenario, however, due date is the last item used to determine the eventual sort order.

### Performing Task Actions

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

- New - Creates a new task.
- Actions - Click this button and select the appropriate option to transfer tasks, select all tasks, or to change the status or priority of tasks.

- Select All - Selects all of the tasks in the content pane.
- Delete - Deletes the selected task(s). For more information, see [Deleting Tasks](#) .
- Transfer - Transfers the selected task(s) to another group or agent. For more information, see [Transferring Tasks](#) .
- Status - To change the status of a task, select the appropriate option from the list.
- Under Consideration - This is a task that has not been finalized or that is still in discussion.
- Approved - This is a task that is finalized but has not been started yet. Therefore, it's been approved by management and is ready to be worked on. (I.e., moved into In Progress)
- In Progress - This task is actively being worked on by an agent.
- On Hold - This is a task that is active, but may require follow-up or further action before it can continue to be worked on or marked with another status.
- In Review - This task is inactive, but it needs to be reviewed by upper management or go through some other review process before it can be marked as Completed or put back to In Progress for further action.
- Completed - This is a task that was successfully completed and closed.
- Rejected - This is a task that was rejected by management.
- Priority - To change the priority level of a task, select the appropriate option from the list.
- Low - The selected tasks have a low priority and will be sorted toward the bottom of the lists.
- Normal - The selected tasks have a normal or unspecified priority level.
- High - The selected tasks are a high priority and will be sorted toward the top of the lists.
- Urgent - The selected tasks are very important and will show at the top of the lists.

## Creating New Tasks

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. Agents can create new tasks to organize their time, assign tasks to other agents and schedule tasks that regularly take place. To create a new task, click the New Item icon and then click Task . Alternatively, when in the Tasks section, you can click New in the content pane toolbar. The following tabs are available in the new task window:

### Options

- Owned By - Tasks can either be owned by an Agent or a Related Item. For tasks to be owned by a related item, the task must be created FROM the ticket, live chat or call log by selecting the item and clicking Add > Task. The task will then be listed on the Related Items tab of the ticket, live chat or call log. In the Tasks section, the related item number will be shown when editing the task.

- Agent - When a task is owned by an agent, the person creating the task can select a specific agent to assign the task to.
- Related Item - When a task is owned by a related item, this field displays the ticket, live chat or call log number the task is associated with.
- Subject - The title of the task.
- Status - Select the status of the task. Generally, an agent will want to mark a new task as In Progress. For more information on tasks status, see the Tasks Overview .
- Priority - Select the priority level of the task. By default, tasks are set to normal priority.
- Start Date/Time - The date and time the agent should start the task.
- Due Date/Time - The date and time the agent should have the task completed.
- Original Estimate - When a task is created, the agent can add an estimated time it will take to complete the task in minutes, hours, days or weeks.
- Remaining Estimate - Adjusting the remaining estimate gives managers a better understanding of how much time is still needed to complete the task.
- Reminder - Select when to receive a reminder about an upcoming task. For example, if the agent selects 10 minutes, a reminder will pop up 10 minutes before the task is due.
- Reminder - Agents have the ability to set a reminder when the task is coming due.

## Description

- Description - Allows an agent to type in any description or notes, status updates, records of discussions, ideas, thoughts and more regarding the task.

## Task Scheduler

SmarterTrack's task management feature provides agents with an easy method to track business tasks and complete them on time. In some cases, an agent's tasks will need to occur on a regular basis. For example, a human resources employee might schedule a biweekly task to complete payroll, while a supervisor might schedule a monthly review of his department's ticket workload. In these types of cases, a recurring task can be scheduled. When the task comes due (either at its start date or scheduled recurrence), a new task will be created with the details configured in the Task Scheduler.

Note: Scheduled tasks will continue to be created at their scheduled recurrence regardless of the status of previously created tasks. This means that if the tasks are not managed or marked as Completed, duplicate tasks will be available when viewing the tasks In Progress, Approved, etc.

To access the Task Scheduler, log into the SmarterTrack management interface with an agent account. Then click on the Tasks icon . In the navigation pane, click on Task Scheduler . When you create a

new recurring task or edit an existing one, the Task Scheduler will load in a new window, and the following tabs will be available:

### **Options**

- Subject - The title of the task.
- Agent - The agent that should be assigned the recurring task.
- Status - Select the status of the task that will be created. Generally, an agent will want to mark a new task as In Progress. For more information on tasks status, see the Tasks Overview .
- Priority - Select the priority level of the task that will be created. By default, tasks are set to normal priority.
- First Occurrence - The date and time the agent should start the first occurrence of the recurring task.
- Original Estimate - When a task is created, the agent can add an estimated time it will take to complete the task in minutes, hours, days or weeks.
- Remaining Estimate - Adjusting the remaining estimate gives managers a better understanding of how much time is still needed to complete the task.

### **Description**

On this tab, you can type in any description or notes, status updates, records of discussions, ideas, thoughts and more regarding the task.

### **Recurrence Information**

On this tab, you can set the frequency for how often the task needs to repeat. The recurrence feature is very flexible and can be as simple or as complex as necessary. Select whether the task should recur hourly, daily, weekly, monthly, or yearly. Then choose how often the task occurs. For example, if the task should occur every week, choose "Weekly" and leave the recurrence at "Every 1 week(s)." If the task should occur every third Monday, you would set the recurrence at "Every 3 week(s)," and select Monday from the list of days.

### **Deleting Scheduled Tasks**

To stop a task from regularly recurring, delete the task entry from within the Task Scheduler. Note that deleting a task under My Tasks or Global Tasks will delete that single task instance . If the entry is not removed from the Task Scheduler, a new task will be created at the next scheduled recurrence.

### **Viewing Tasks**

To view a task, simply click a task and it will display in the preview pane. If you would rather view

the task in a popup window, double-click the task instead. Note: Double-clicking a task assigned to you also enables you to edit the task.

Generally, tasks are organized into different sections depending on whether they are under consideration, approved, in progress, on hold, in review, completed or rejected. To view tasks by status, click on the desired status under Global Tasks (if you have the appropriate role permissions) or My Tasks in the navigation pane. All tasks with the selected status will load in the content pane. For more information on the options available when viewing a task, see [Tasks Overview](#) .

## Transferring Tasks

On occasion, an agent may need to transfer a task to another agent or group. There are various reasons why a task may be transferred. For example, an agent that is leaving for vacation may need to transfer tasks to another agent to ensure they are completed while he is out of the office. As an another example, if an agent finds his workload is too heavy, he may transfer a task to another agent to rebalance his workload. Note: The ability to transfer tasks is determined by the role permissions. By default, agents can transfer tasks. For more information, see [Roles](#) .

To transfer a task, select the task in the content pane, then use the Actions menu in the content pane toolbar to click on Transfer . This will open a pop-up window with the following fields:

- New Agent - Select the agent to which the task should transfer from the list.
- New Status - Select the status of the task. Generally, an agent will want to mark a transferred task as active.
- New Priority - Select the priority level of the task. By default, the priority level is normal.

Click OK to transfer the task.

Alternatively, agents can transfer tasks by viewing the individual task and selecting a new agent from the Agent dropdown. When the change is saved, the task will be assigned to the new agent.

## Deleting Tasks

On occasion, an agent or administrator may need to delete a task from the system. Note: The ability to delete a task is determined by the role permissions. By default, agents cannot delete tasks. For more information, see [Roles](#) .

To delete a task, simply select the desired task(s) in the content pane. Then click the Actions menu from the content pane toolbar and click Delete . Alternatively, agents can delete the task they are currently viewing by clicking the Delete button in the preview pane toolbar. Regardless of the method used, when an agent deletes a task they are presented with a confirmation dialog. Once a task is deleted, it is no longer available for review or action and will eventually be purged from the system.

Note: Deleted items are purged from the system every 90 days. Items purged from SmarterTrack are no longer indexed and will not return as results when using Advanced Search.

To stop a task from regularly recurring, delete the task entry from within the Task Scheduler. Note that deleting a task under My Tasks or Global Tasks will delete that single task instance. If the entry is not removed from the Task Scheduler, a new task will be created at the next scheduled recurrence.

## Searching Tasks

As time passes, finding a specific task can become increasingly difficult. Fortunately, SmarterTrack's search tool allows employees to find tasks quickly and easily.

### Basic Search

To perform a basic search, type the search criteria in the search bar located near the top of the content pane. Then click the magnifying glass or press Enter on your keyboard. SmarterTrack will automatically search the task section you are viewing (i.e. Approved, In Progress, Closed, etc.) for matches and display the results in the content pane.

### Advanced Search

Employees can set more specific search parameters by using the advanced search function to search for a call log. To perform an advanced search, click Advanced Search in the navigation pane. The search options will load in the content pane.

Advanced searches use the "and" modifier for combining phrases and fields to construct the search. Search results are displayed based on the overall weight of the results returned.

The following fields are available:

- Search String - Type the specific keywords to be queried. Then use the dropdown to select whether to search for this text in the subject and description sections of tasks, tasks subjects alone or comments on tasks alone.
- Related Item - To search by related item, type the number of the associated live chat, ticket, or call log.
- Agent - To search by agent, select the appropriate agent from the list.
- Priority - To search by priority level, select the appropriate priority level from the list.
- Status - To search by task status, select the appropriate status from the list.
- Items to Include - This dropdown allows you to select either all tasks EXCEPT deleted ones or to only search in deleted tasks.
- Start Date - To search by the date the task was started, enter the start date in the fields or click



the calendars and select the appropriate dates.

- Due Date - To search by the date the task was due, enter the due date in the fields or click the calendars and select the appropriate dates.
- Creation Date - To search by the date the task was created, enter the creation date in the fields or click the calendars and select the appropriate dates.
- Last Modified Date - To search by the last modified date, enter the date in the fields or click the calendars and select the appropriate dates.
- Max Results - To specify the maximum number of search results displayed, select the appropriate number of results from the list.

Note: To make searching faster, try limiting the date range or avoiding searches on body text.