



# 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. Because tasks are often associated to a customer service or sales issue, SmarterTrack also allows agents to add related tickets, live chats, and call logs to any task in the system. This ability ensures agents can have all the information necessary to complete a task in one convenient location.

To access your tasks, click the tasks icon . Depending on the role you are assigned, My Tasks or Global Tasks will load.

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

## Navigating Your Tasks

The My Tasks section organizes all of the tasks for which an agent is responsible. When an agent accesses My Tasks by clicking My Tasks in the navigation pane, all active tasks for the agent will load in the content pane.

On occasion, system administrators and managers may want to view all of the tasks in the SmarterTrack system. To view all tasks in SmarterTrack, click Global Tasks in the navigation pane. All active tasks in the system will load in the content pane.

In general, the following columns are available in the content pane:

- **Checkbox** - Use these boxes to select multiple tasks. Tasks must be selected before choosing an action from the toolbar.
- **Subject** - An agent-generated phrase that usually describes the task. Very long subject phrases are truncated.
- **Owner** - The agent assigned to the task.
- **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.

## Performing Task Actions

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 ticket, call log, task, instant message, canned reply, news item or knowledge base article.

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.
- 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.
- Active - Marks the selected task(s) as active. Generally, a task would be marked active when an agent is working on it.
- Closed - Marks the selected task(s) as closed. Generally, a task is marked as closed when the agent has completed the task.
- Priority - To change the priority level of a task, select the appropriate option from the list.
- Urgent - The selected tasks are very important and will show at the top of the lists.
- High - The selected tasks are a high priority and will be sorted toward the top of the lists.
- Normal - The selected tasks have a normal or unspecified priority level.
- Low - The selected tasks have a low priority and will be sorted toward the bottom of the lists.
- View - Click this button and select the appropriate option to refresh the page or choose the details that are displayed about a ticket in the navigation pane.
- Refresh - Refreshes the page.
- Visible Fields - Choose which columns are displayed in the navigation pane.
- Delete - Deletes the selected task(s). When a task is deleted, it will be moved to the Deleted Items section of the navigation pane. For more information, see [Deleting Tasks](#) .

## Creating New Tasks

To create a new task, click New in the navigation pane toolbar and then click Task . This will open a new task window that the agent will use to create the task.

The following fields will appear in the new task window:

- Subject - The title of the task.
- Agent - The agent the task should be assigned to.
- Start Date - The date and time the agent should start the task.
- Due Date - The date and time the agent should complete the task by.
- Status - Select the status of the task. Generally, an agent will want to mark a new task as

active.

- Priority - Select the priority level of the task. By default, tasks are set to normal priority.
- 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.
- Related Item - If the task is associated to a specific ticket, live chat, or call log, type the item number in this field.
- Description - Type any description or notes regarding the task.

Click Save to create the task.

## 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.

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

- Edit - Allows the agent to modify the task.
- Print - Allows the agent to print the information in the task.

## Tabs within a Task

Task information is organized within the following tabs:

- Description - This tab includes any description or notes regarding the task.
- Details - This tab includes all information pertaining to the task, including start date, end date, creation date, reminders, related items, status, and priority level of the task. Any modifications to the task are also recorded in this tab.

Note: When viewing the task in the preview pane, the task information may be displayed differently.

## Viewing Tasks by Status

Generally, tasks are organized into different sections depending on whether they are active, upcoming or closed. To view tasks by status, click the task icon , expand Global Tasks or My Tasks in the navigation pane and select the desired status. All tasks with the selected status will load in the content pane.

## Viewing Deleted Tasks

To view deleted tasks, click the tasks icon and click Deleted Items in the navigation pane. All deleted tasks will load in the content pane. For more information, see Deleting Tasks .

## 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 live chat, select the live chat and click the Actions menu in the content pane toolbar and click 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.

## Deleting Tasks

On occasion, an agent or system 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 Delete in the content pane toolbar. Alternatively, agents can delete a task they are currently viewing by clicking Delete in the preview pane toolbar.

When a task is deleted, it will be moved to the Deleted Items area of the task section. To view deleted tasks, click Deleted Items in the navigation pane. A list of deleted tasks will load in the content pane. For information on any of the available options, see Tasks Overview .

## Undeleting Tasks

Didn't mean to delete a task? Agents can retrieve deleted tasks from Deleted Items as long as the system hasn't been purged yet. Just click Deleted Items in the navigation pane and select the desired task(s). Then click the Delete menu in the content pane toolbar and click Undelete . Note: Your system administrator can permanently remove the tasks in Deleted Items at any time without warning, so don't delete tasks if you might want them later. After the system purges any items marked for deletion, you can't retrieve the deleted tasks.

## 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. active, upcoming, 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.

The following fields are available:

- Search String - Type the specific keywords to be queried. The subject and description sections of tasks will be searched for these keywords.
- 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.
- 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.
- Sort Results - To specify the order in which results are displayed, select the appropriate option from the list.
- 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.