Tasks

Help Documentation

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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 (or both) will load.

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

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 ablity to review all tasks in SmarterTrack, either by status or by agent. Clicking on Global Tasks in the navigation pane then 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 columns will be available, though you can modify which columns appear, as well as the column widths, as needed, using the View menu:

- Checkbox - Use these boxes to select multiple tasks. Tasks must be selected before choosing an action from the toolbar.
- Status - Indicates the status and priority level of each task. (See below for Status definitions)
- 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 releated 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.
• Completion Date - The date the specific task was marked as completed.
• Original Estimate - The original estimated time for the task to be completed.
• Remaining Estimate - The estimated time remaining for the task to be completed.

Sorting

Clicking on any column header allows you to sort that column 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 the Status column, tasks sort from left to right, meaning they sort by status then the task's priority (or vice versa, depening 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.
• 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 contine 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.
• 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.

• Categories - Allows you to see tasks for all master categories , tasks without a master category assigned or tasks for specific master categories.
• Visible Fields - Choose which columns are displayed in the navigation pane. It is also possible to modify default widths for each column to help them fit specific screen resolutions.
• Delete - Deletes the selected task(s). For more information, see Deleting Tasks .

Creating New Tasks

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 preview pane toolbar. This will open a new task window that the agent will use to create the task.

The following fields will appear in the Options tab of the new task window:

• Owned By - New tasks can either be owned by an Agent, so that the task is created for, and assigned to, a specific agent, or owned by a related item. When a task is "owned by" a related item, the agent creating the task can attach the task to a specific ticket, live chat or call log.

• 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, use this field to add in the ticket, live chat or call log number the task is to be 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.

There are two other tabs available in the new task window:

- Description - Allows an agent to type in any description or notes, status updates, records of discussions, ideas, thoughts and more regarding the task.
- Categories - Allows an agent to assign tasks to any master categories that are available.

The following options are available in the toolbar of the ticket response window:

- Save - Click 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.

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, expand Global Tasks (if you have the appropriate role permissions) or My Tasks in the navigation pane and select the desired status. 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 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 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 Delete menu in the content pane toolbar. Alternatively, agents can delete the task they are currently viewing by clicking the Delete menu 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 SmartrerTrack are no longer indexed and will not return as results when using Advanced Search.

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.

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 In - This dropdown allows you to select either all tasks EXCEPT deleted ones or to only search in deleted tasks.
- 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.
- Categories - To search by task category, select the appropriate category or group 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.