

Tasks!

eWay-Book

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1 Introduction

eWay-CRM 5.3 comes with a full-featured Tasks module which will help you keep all matters under control. The new module pushes the boundaries of Outlook and eliminates the problems Outlook tasks have had since the very first versions. See our list of the biggest benefits below.

Delegating tasks and team tasks

- With the new tasks, you can work on a task even after delegating it.
- You can easily view other people's tasks and work with them fully.
- You can finally start using team tasks.
- You can easily view all company tasks on one screen at a meeting.

System and order

- "Task" and "Flagged e-mail" are in one place – in eWay-CRM Tasks.

Mobility / Working on the go

- Use Tasks easily also in eWay-CRM Mobile - including editing and delegating.

Adjustability

- You can create custom fields.
- It's easy to define different types of tasks.
- You can set a different workflow for each type.

Control and supervision

- You are provided with a detailed log of task work history.

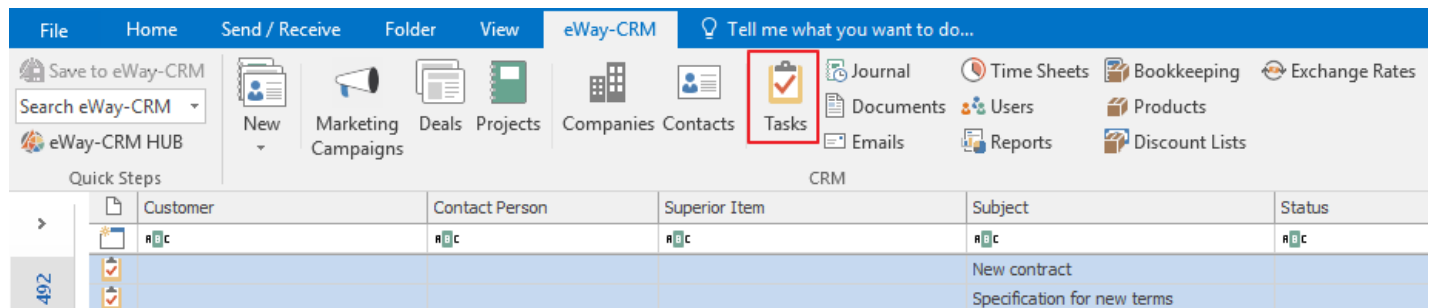
2 What Happens after Upgrading to eWay-CRM 5.3

Tasks will stay where they are – don't panic.

1. Those with a Superior Item in Outlook will stay in both eWay-CRM and Outlook.
2. Those without a Superior Item in Outlook will only stay in Outlook. Those are your private tasks.
3. Flagged e-mails won't import into eWay-CRM.

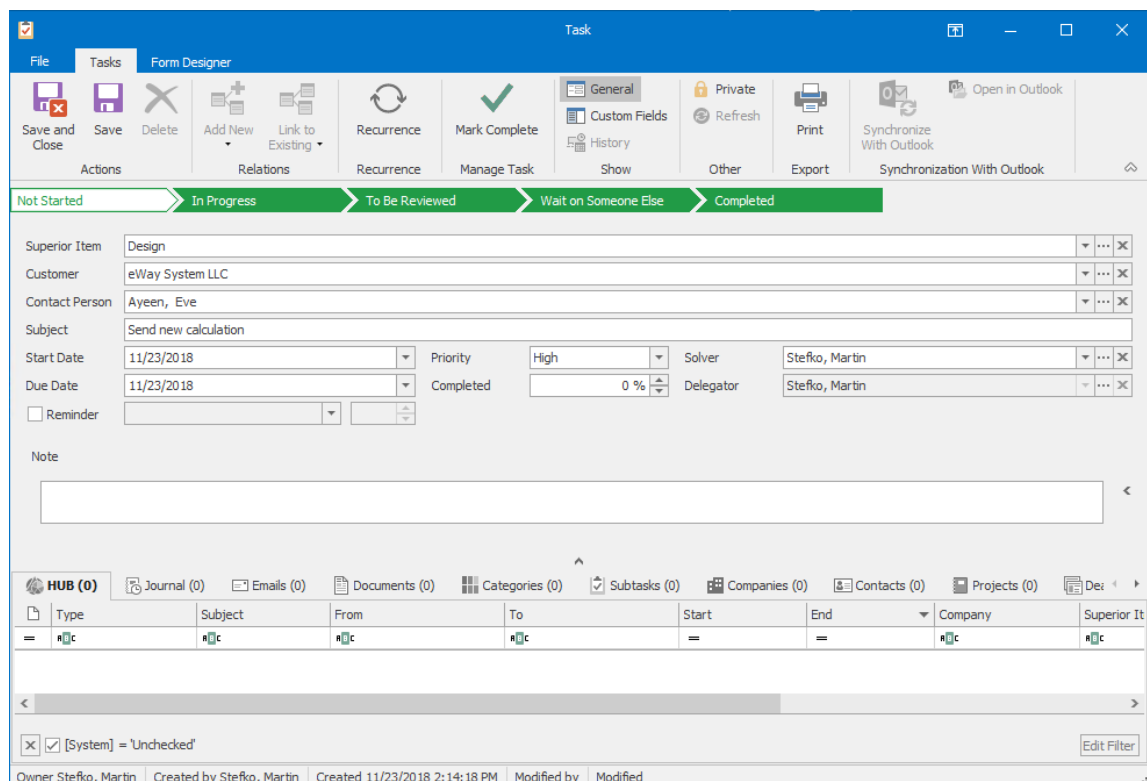
2.1 New Module in the eWay-CRM Toolbar

You can find the new Tasks button in the eWay-CRM section within the Outlook toolbar. All tasks can be found there in one place. They can be easily grouped by solvers, due dates, or companies. (Find more information on how to do that in [How to Create Grid Reports](#)).



2.2 New Task Window

If you open a task from eWay-CRM, you can manage it easily through our new window for task management. It can be used the same way as any other windows in eWay-CRM.

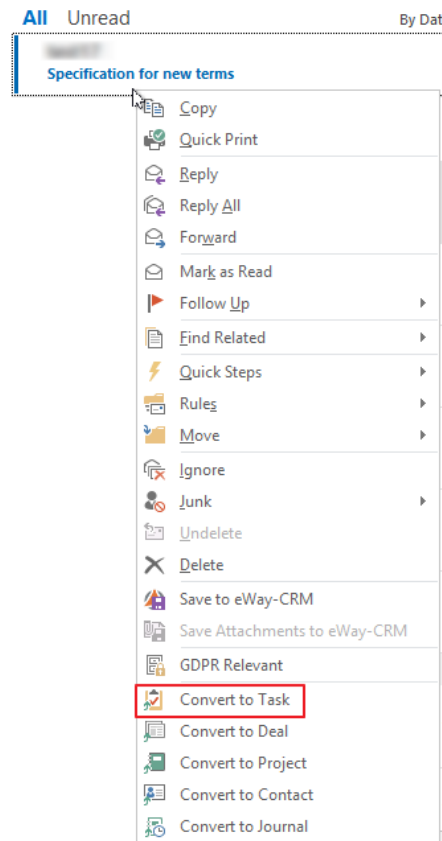


The screenshot shows the 'Task' window in eWay-CRM. The window has a title bar with standard Windows controls. Below the title bar is a ribbon with tabs: 'File', 'Tasks', and 'Form Designer'. The 'Tasks' tab is active, showing a toolbar with buttons for 'Save and Close', 'Save', 'Delete', 'Add New', 'Link to Existing', 'Recurrence', 'Mark Complete', 'General', 'Custom Fields', 'History', 'Private', 'Refresh', 'Print', 'Synchronize With Outlook', and 'Open in Outlook'. Below the toolbar is a progress bar with five stages: 'Not Started', 'In Progress', 'To Be Reviewed', 'Wait on Someone Else', and 'Completed'. The main area contains a form for task details, including fields for 'Superior Item', 'Customer', 'Contact Person', 'Subject', 'Start Date', 'Due Date', 'Priority', 'Completed', 'Solver', and 'Delegator'. Below the form is a 'Note' field. At the bottom, there is a grid showing related items with columns for 'Type', 'Subject', 'From', 'To', 'Start', 'End', 'Company', and 'Superior It'. The grid contains one row of data. At the very bottom, there is a status bar with information about the task's ownership and creation/modification dates.

Type	Subject	From	To	Start	End	Company	Superior It

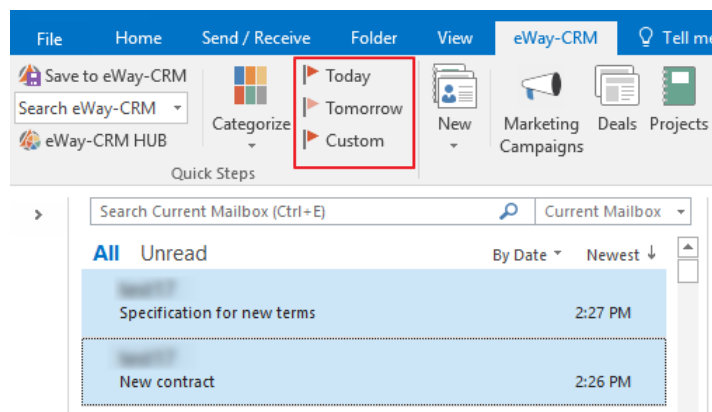
2.3 Context Menu in a Microsoft Outlook E-mail

In the context menu of an e-mail, you can see a button called Convert to Task. For more information, see [How to Convert E-mail to Task](#).



2.4 A Toolbar for Converting an E-mail to a Task Quickly

We have also prepared a new set for converting an e-mail to a task quickly. Learn more in [How to QUICKLY Convert E-mail to Task](#).



If you prefer, there is still a possibility to synchronize tasks with Outlook (more in [How to Synchronize Tasks with Outlook](#)). However, it is not necessary anymore. The whole agenda can be managed straight from eWay-CRM.

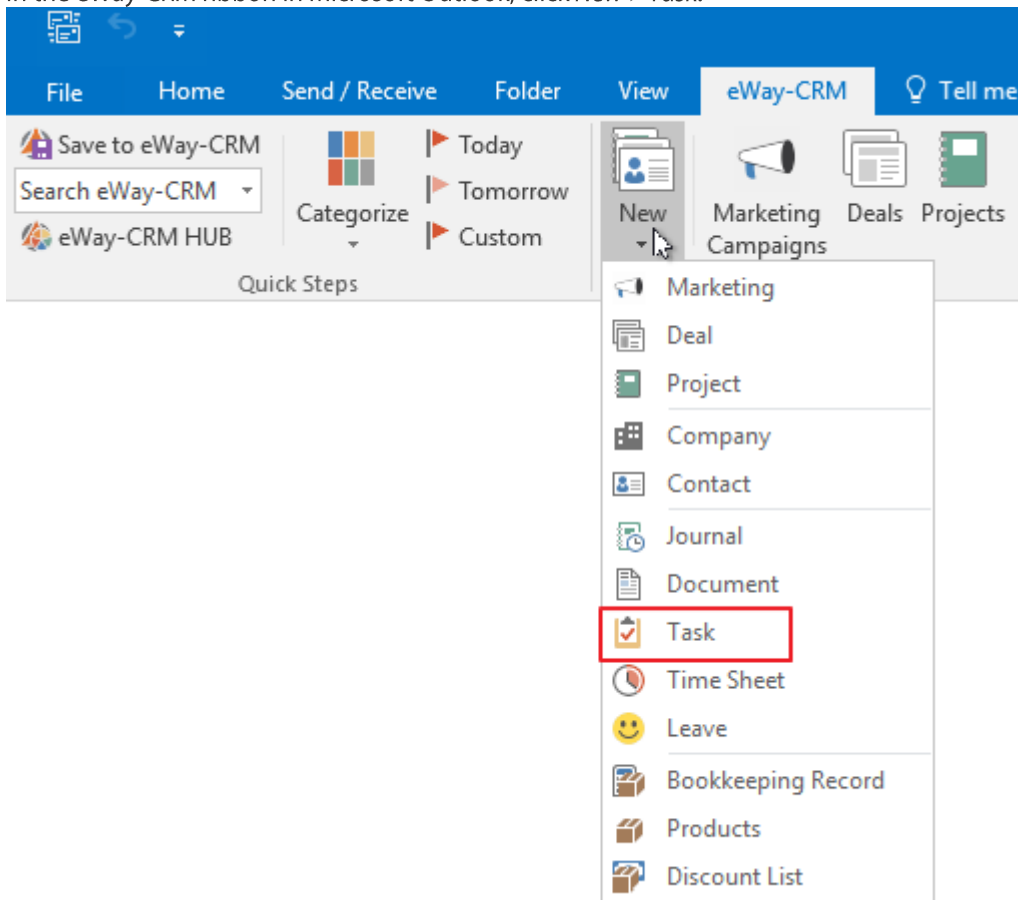
If you still want to create tasks in Outlook, everything remains the same – choose a Superior Item, the tasks save to eWay-CRM and will keep synchronizing.

3 How to Start Using Tasks in eWay-CRM

3.1 How to Create a New Task in the eWay-CRM Bar in Microsoft Outlook

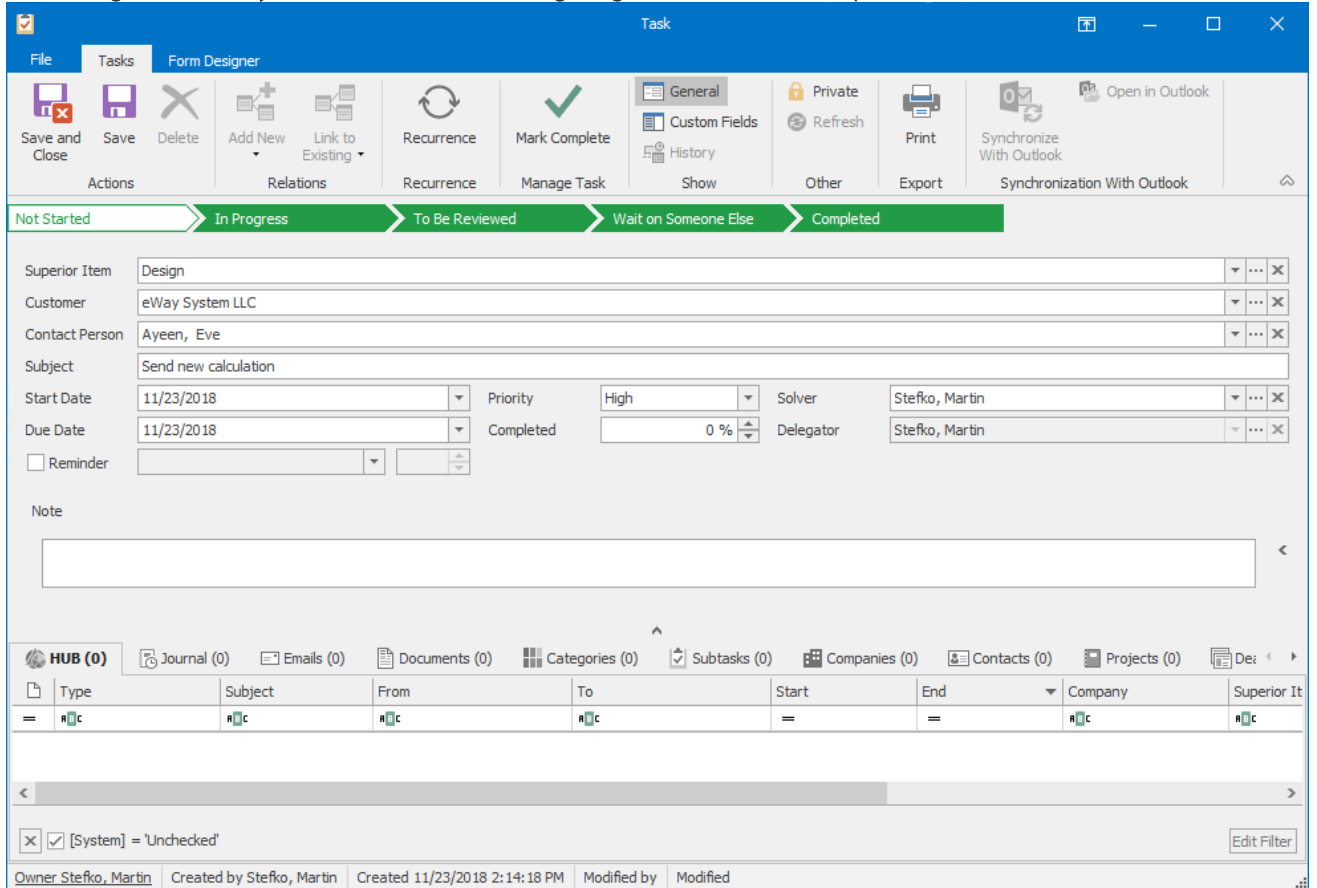
Working with tasks in eWay-CRM is not different from working with other types of items, e.g. journals.

1. In the eWay-CRM ribbon in Microsoft Outlook, click *New > Task*.



2. Fill in values that are important to you, e.g. *Subject* or *Due Date*.

Don't change the solver yet, we will talk about delegating tasks in another chapter.



The screenshot shows the 'Task' form in the eWay CRM application. The form is titled 'Task' and has a blue header bar. Below the header is a ribbon with tabs: 'File', 'Tasks', and 'Form Designer'. The 'Tasks' tab is active, showing a ribbon with icons for 'Save and Close', 'Save', 'Delete', 'Add New', 'Link to Existing', 'Recurrence', 'Mark Complete', 'General', 'Custom Fields', 'History', 'Private', 'Refresh', 'Print', 'Synchronize With Outlook', and 'Open in Outlook'. Below the ribbon is a progress bar with five stages: 'Not Started', 'In Progress', 'To Be Reviewed', 'Wait on Someone Else', and 'Completed'. The 'Not Started' stage is selected. The form fields are as follows:

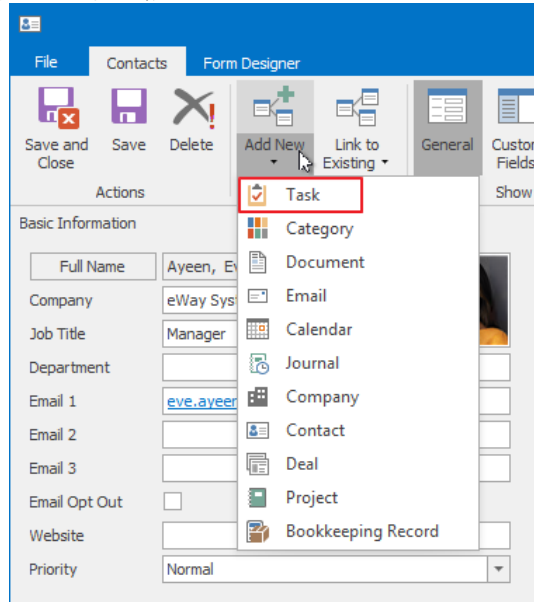
- Superior Item: Design
- Customer: eWay System LLC
- Contact Person: Ayeen, Eve
- Subject: Send new calculation
- Start Date: 11/23/2018
- Due Date: 11/23/2018
- Priority: High
- Solver: Stefko, Martin
- Completed: 0 %
- Delegator: Stefko, Martin
- Reminder: ☐
- Note:

Below the form fields is a 'HUB (0)' section with a list of related items. The list has columns: Type, Subject, From, To, Start, End, Company, and Superior It. The first row shows a task with Type 'Task', Subject 'Task', From 'Task', To 'Task', Start '11/23/2018', End '11/23/2018', Company 'eWay System LLC', and Superior It 'Design'. Below the list is a filter bar with a checkbox for '[System] = 'Unchecked'' and an 'Edit Filter' button. At the bottom of the form is a status bar with the following information: Owner Stefko, Martin; Created by Stefko, Martin; Created 11/23/2018 2:14:18 PM; Modified by; Modified.

3. Click Save or Save and Close icon.

3.2 How to Create Task from eWay-CRM Item Window (e.g. From Company)

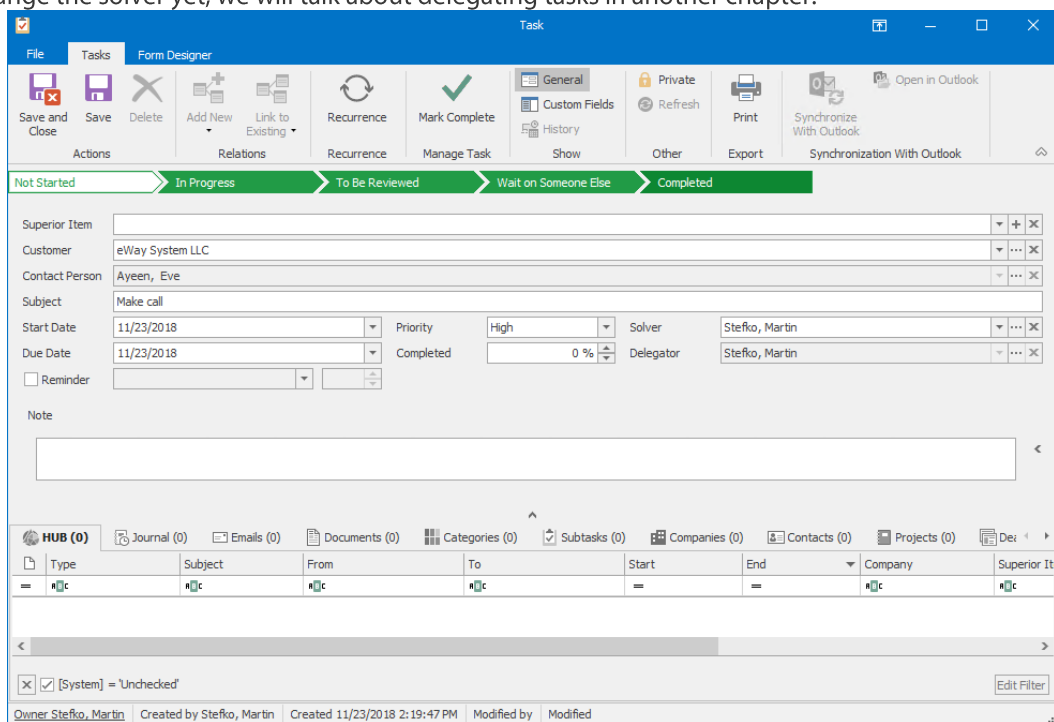
1. In the item window (e.g. company, contact, etc.), click *Add New > Task*



2. The item that the task was created from is automatically filled in the task. If the item was a Project or Deal, company and contact from Project/Deal are filled in the task, too.

You just insert values you need, e.g. *Superior Item, Subject, or Due Date*.

Don't change the solver yet, we will talk about delegating tasks in another chapter.



Type	Subject	From	To	Start	End	Company	Superior It
Task	Make call	eWay System LLC	Ayeen, Eve	11/23/2018	11/23/2018	eWay System LLC	Ayeen, Eve

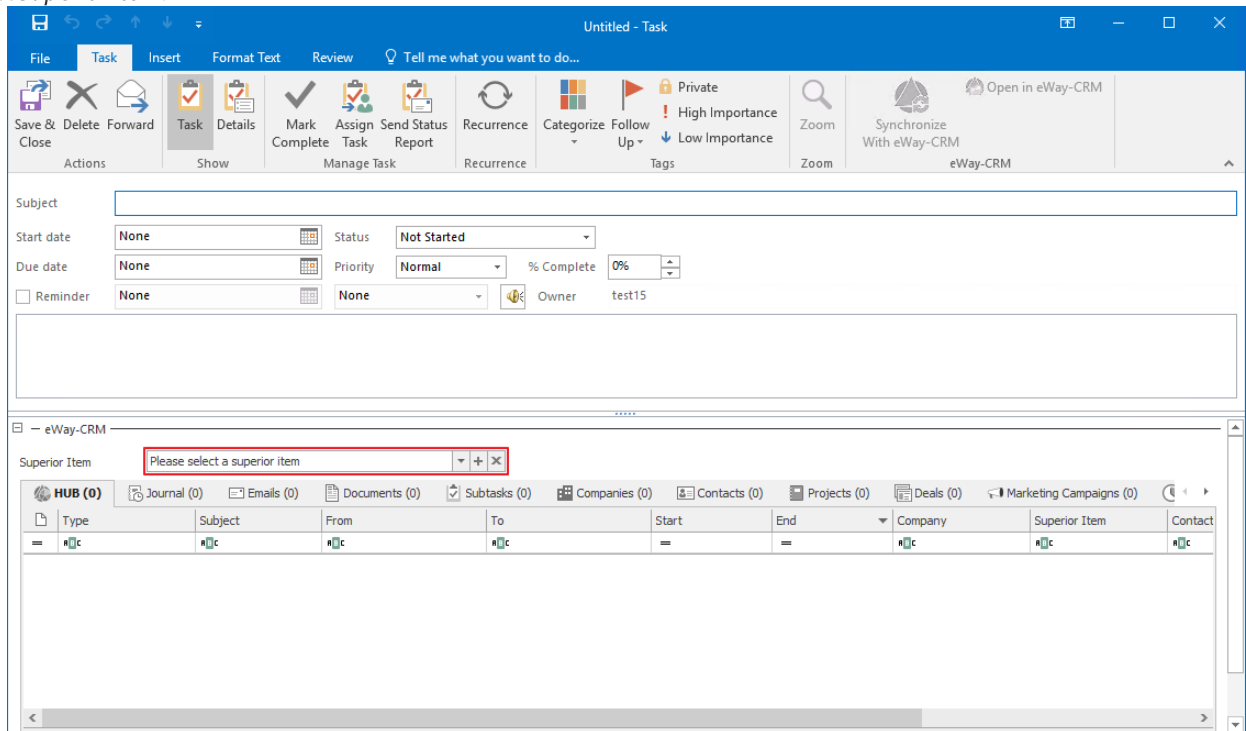
Owner: Stefkio, Martin | Created by: Stefkio, Martin | Created: 11/23/2018 2:19:47 PM | Modified by: | Modified:

3. Click Save or Save and Close icon.

3.3 How to Create a Task in Microsoft Outlook (and Synchronize It With eWay-CRM)

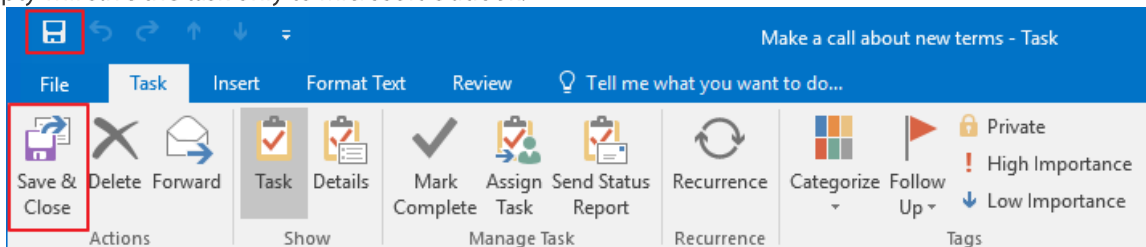
If you make a mistake and open the Outlook task window instead of eWay-CRM, don't worry. Nothing changes.

1. Select *Superior Item*.



2. Insert other values that are important for your task.
3. Click Save or Save and Close icon.

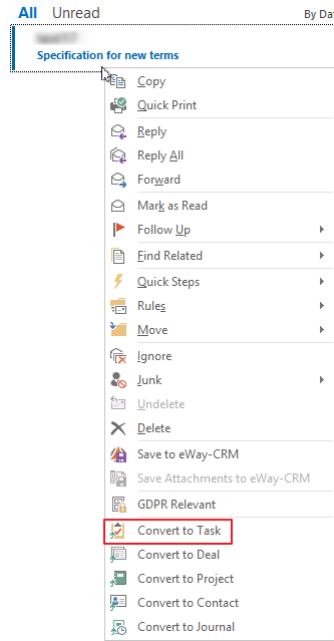
Because you have selected Superior Item, the task will be automatically saved to eWay-CRM, too. Leaving Superior Item empty will save the task only to Microsoft Outlook.



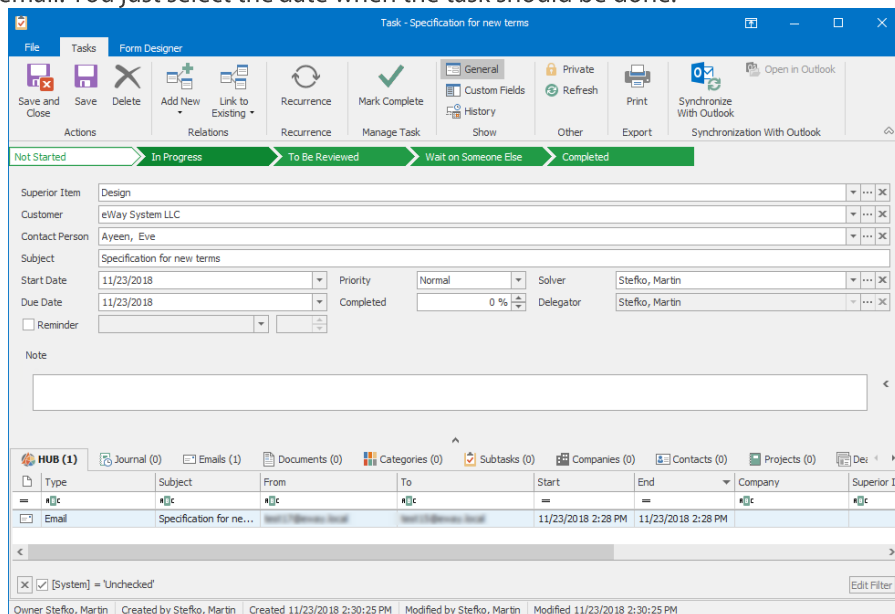
3.4 How to Convert E-mail to Task

We are given a lot of tasks through e-mails. eWay-CRM allows you to easily convert emails to tasks so that you have all your duties in one place – in eWay-CRM Tasks module. Thanks to that, you don't need to switch between Inbox, Tasks, your notebook, and Post-Its on your monitor.

1. Right-click an email.



2. Select Convert to Task.
3. If the email has the Superior Item field filled, the Superior Item is pre-filled on the task, too. Subject of the task is the same as Subject of the email. You just select the date when the task should be done.



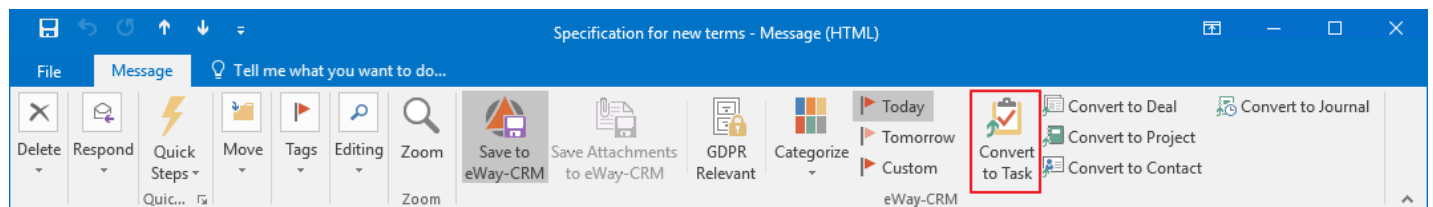
Type	Subject	From	To	Start	End	Company	Superior It
Email	Specification for ne...	Stefko, Martin	Stefko, Martin	11/23/2018 2:28 PM	11/23/2018 2:28 PM		

4. Notice that the email is automatically related to the task.

HUB (1) Journal (0) Emails (1) Documents (0) Categories (0) Subtasks (0) Companies (0) Contacts (0) Projects (0) Des (0)				
Superior Item	Subject	From	To	Sent on
Design	Specification for new terms	martin@eway-crm.com	martin@eway-crm.com	11/23/2018 2:28:00 PM

Owner: Stefko, Martin | Created by: Stefko, Martin | Created: 11/23/2018 2:30:25 PM | Modified by: Stefko, Martin | Modified: 11/23/2018 2:30:25 PM

Note: *Convert to Task* button is also available in the ribbon of the opened email window.

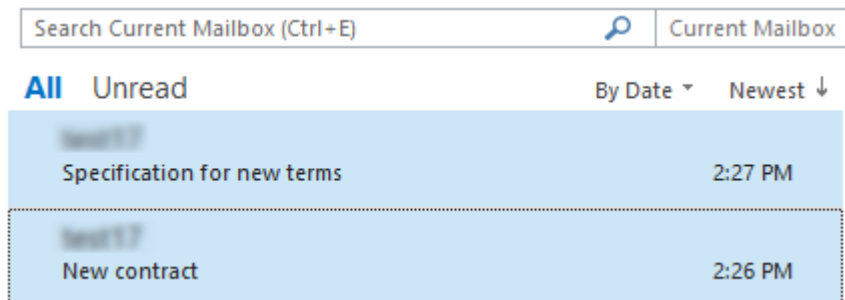


3.5 How to QUICKLY Convert E-mail to Task

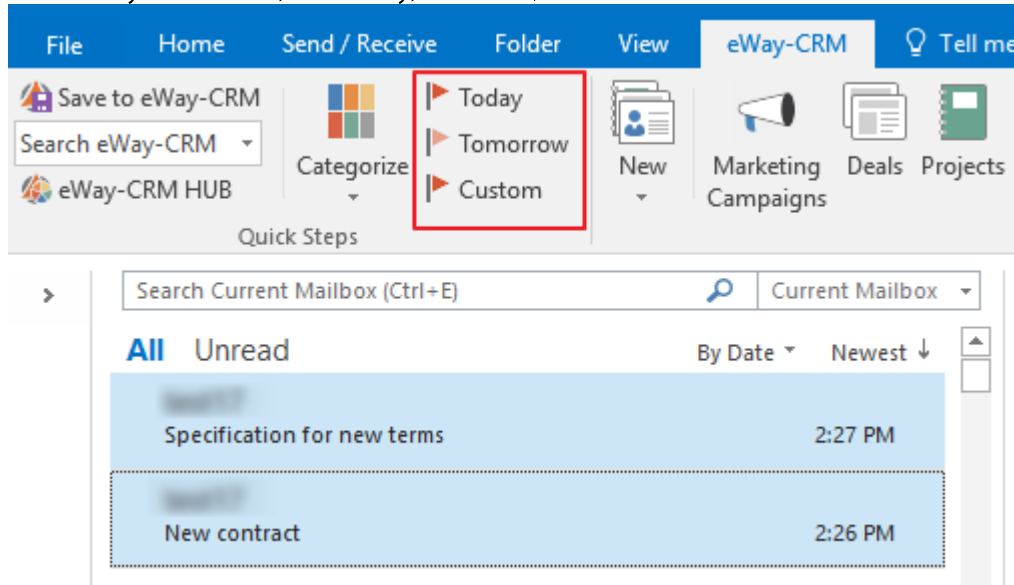
3.5.1 Incoming E-mail

This function comes in handy in the morning when you want to have a look over your emails and plan your activity on them.

1. Select one or more emails in Microsoft Outlook.

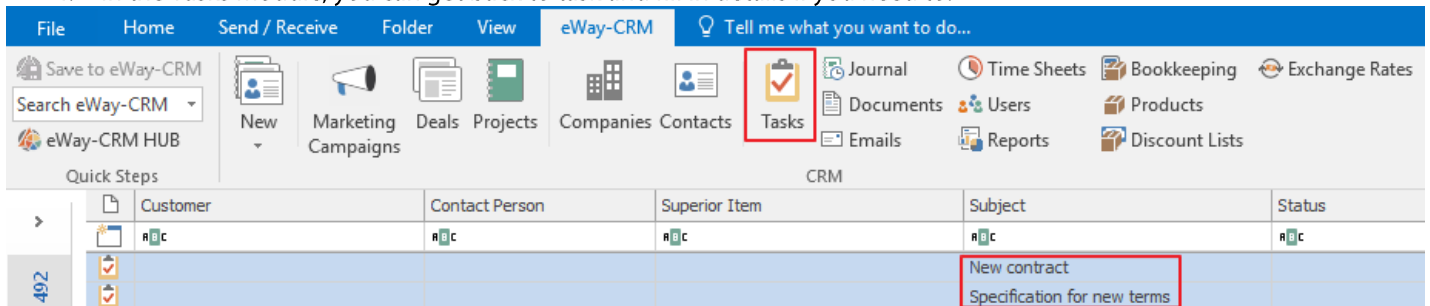


- In the eWay-CRM ribbon, click *Today*, *Tomorrow*, or *Custom*.



- E-mail is automatically converted to task and related to the task. E-mail can be found in the task window.

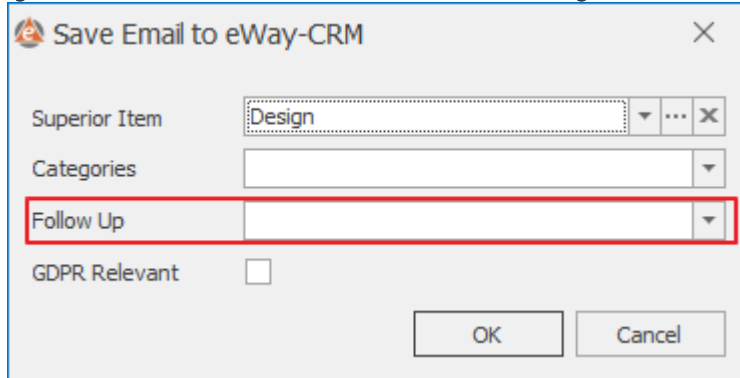
- In the Tasks module, you can get back to task and fill in details if you need to.



3.5.2 Outgoing E-mail

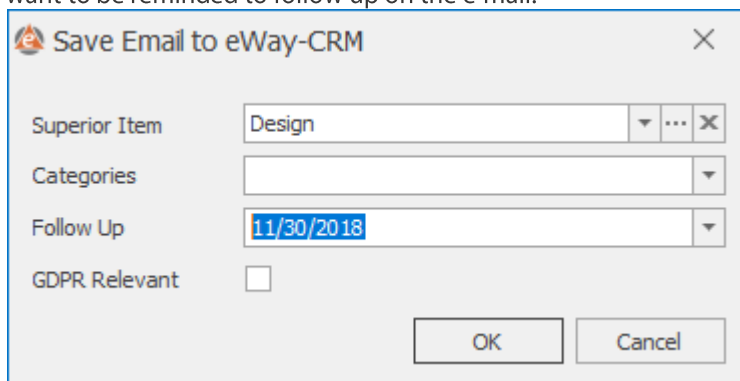
You will appreciate this function if you are sending an e-mail and you want to make sure that the other side answers. Easily set a reminder for this e-mail.

1. When saving an outgoing e-mail, there is a new field in the email save dialog box called *Follow Up*.



The screenshot shows a dialog box titled "Save Email to eWay-CRM". It contains the following fields: "Superior Item" with a dropdown menu showing "Design", "Categories" with an empty dropdown, "Follow Up" with an empty dropdown (highlighted by a red rectangle), and "GDPR Relevant" with an unchecked checkbox. At the bottom right are "OK" and "Cancel" buttons.

2. Select a date when you want to be reminded to follow up on the e-mail.



The screenshot shows the same dialog box as before, but the "Follow Up" dropdown now displays the date "11/30/2018". The other fields and buttons remain the same.

3. Click OK button.

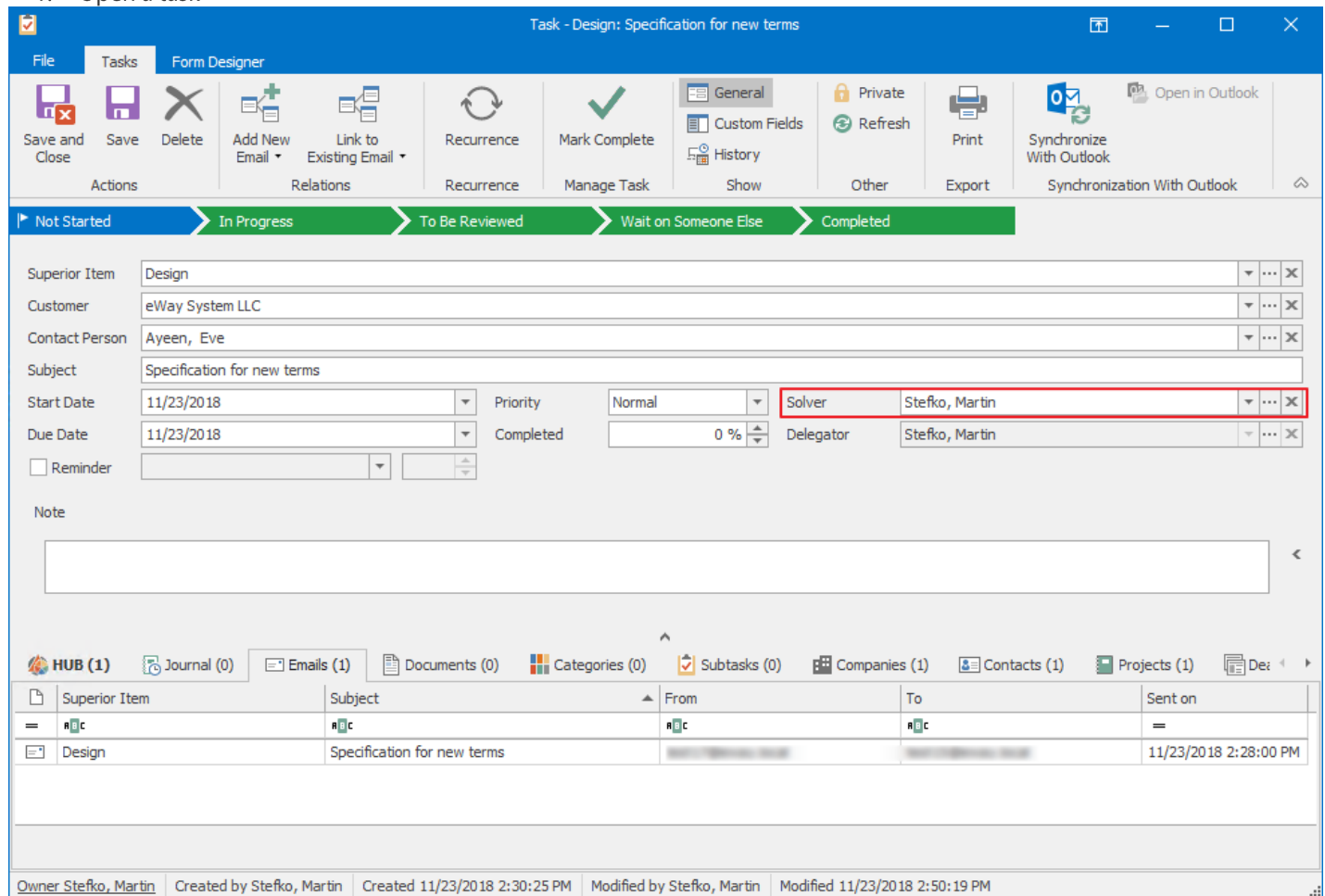
Note: eWay-CRM automatically converts your outgoing e-mail to a task. You will find it in your task summary on the Superior Item card, or on any other joined item (company, contact).

3.6 How to Assign / Delegate Task to a Colleague

If you delegate a task to your colleague in eWay-CRM, you do not lose the supervision. You can still change dates or other parameters or delegate the task to someone else if you see the original solver is not able to finish it in time. This is not possible in Outlook.

And we go even further. If your colleague has a vacation or you have already completed your job, you can start working on their tasks to help them.

1. Open a task

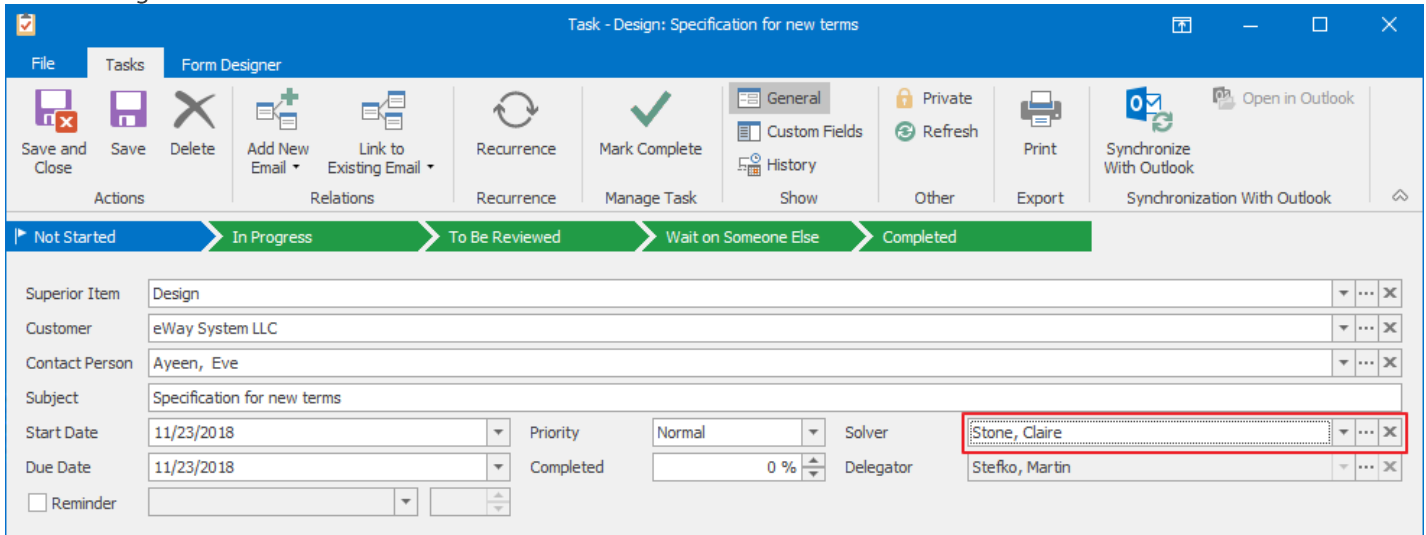


The screenshot shows the 'Task - Design: Specification for new terms' window in eWay CRM. The task is currently in the 'In Progress' state. The 'Solver' field is highlighted with a red box, showing 'Stefko, Martin'. The 'Delegator' field also shows 'Stefko, Martin'. The task is assigned to 'Stefko, Martin' and is currently in the 'In Progress' state.

Superior Item	Subject	From	To	Sent on
Design	Specification for new terms	Stefko, Martin	Stefko, Martin	11/23/2018 2:28:00 PM

Owner: Stefko, Martin
 Created by: Stefko, Martin
 Created: 11/23/2018 2:30:25 PM
 Modified by: Stefko, Martin
 Modified: 11/23/2018 2:50:19 PM

2. Change the solver.



Task - Design: Specification for new terms

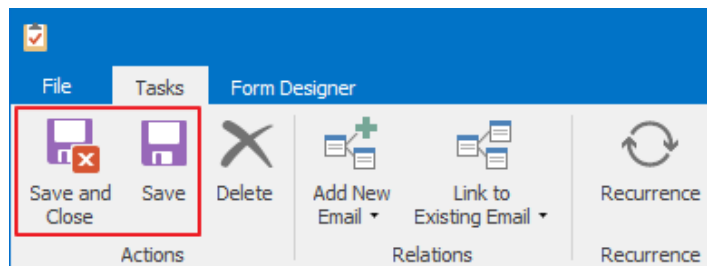
File Tasks Form Designer

Save and Close Save Delete Add New Email Link to Existing Email Recurrence Mark Complete General Custom Fields History Private Refresh Print Synchronize With Outlook Open in Outlook

Not Started In Progress To Be Reviewed Wait on Someone Else Completed

Superior Item Design Customer eWay System LLC Contact Person Ayeen, Eve Subject Specification for new terms Start Date 11/23/2018 Priority Normal Solver Stone, Claire Due Date 11/23/2018 Completed 0 % Delegator Stefko, Martin

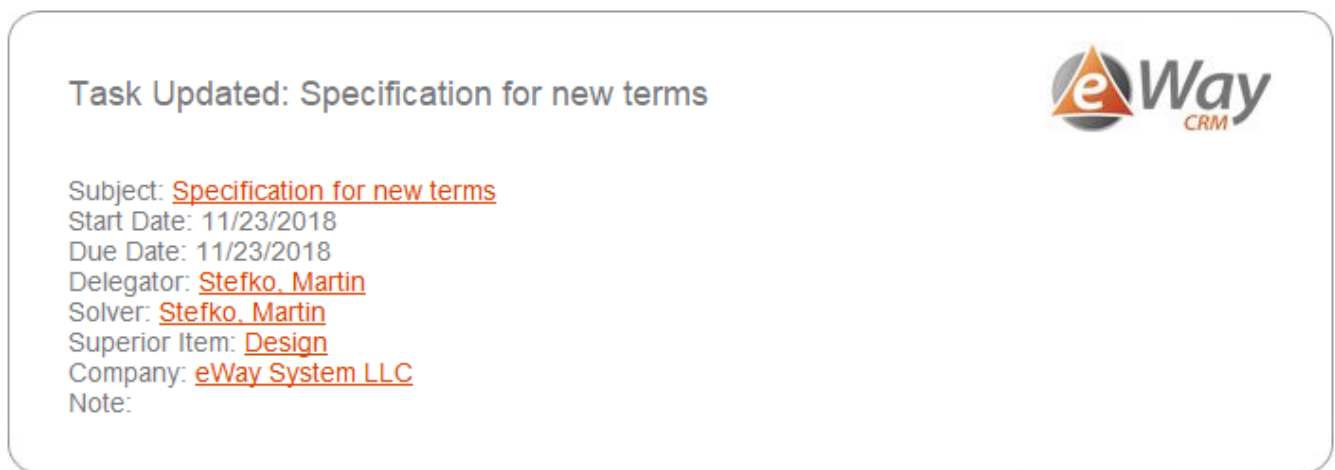
3. Save it.



File Tasks Form Designer

Save and Close Save Delete Add New Email Link to Existing Email Recurrence

4. The new solver will receive an email. It is just a notification with no Accept or Deny buttons.



Task Updated: Specification for new terms

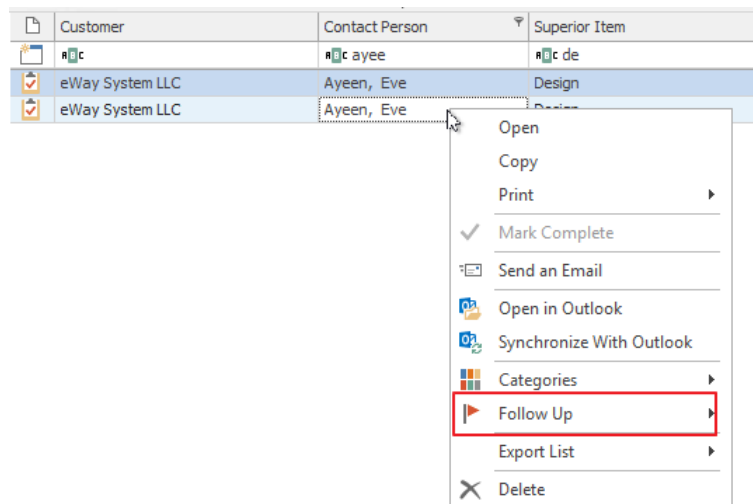
Subject: [Specification for new terms](#)
 Start Date: 11/23/2018
 Due Date: 11/23/2018
 Delegator: [Stefko, Martin](#)
 Solver: [Stefko, Martin](#)
 Superior Item: [Design](#)
 Company: [eWay System LLC](#)
 Note:

Generated by eWay-CRM system.

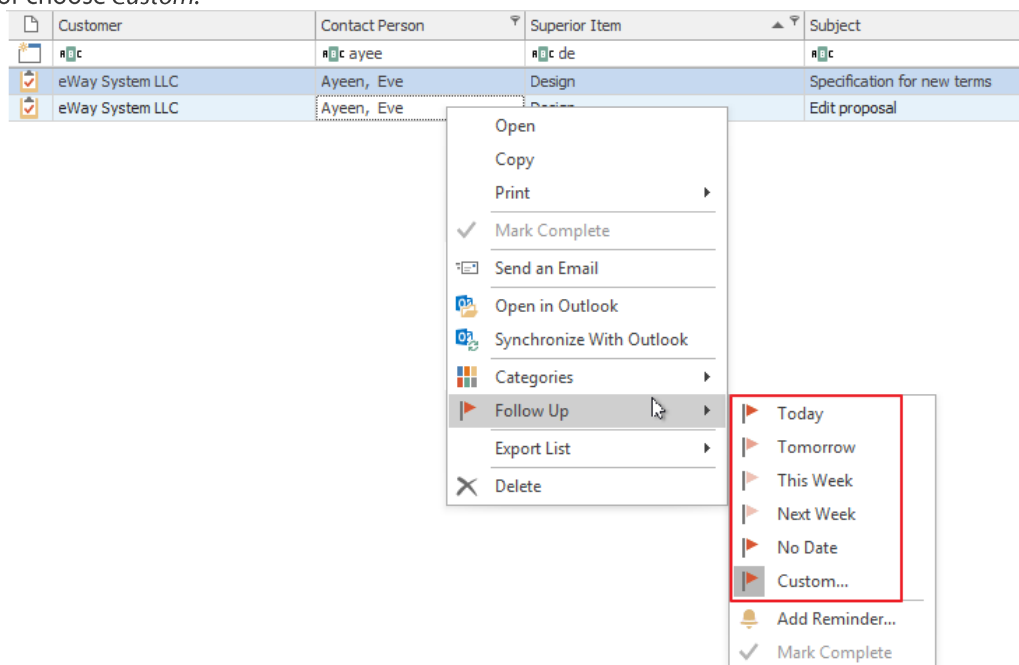
Note: This is a major difference from Outlook tasks, where the notification of a delegated task contained Accept and Deny buttons. As a boss, if you delegate a task in eWay-CRM, it is also accepted automatically. If the new solver feels like the task does not belong to them, they can open it and set the correct solver.

3.7 How to Bulk Change Due Date of Tasks

1. In the eWay-CRM task lists, select one or more tasks.
2. Right-click them.
3. Select Follow Up.

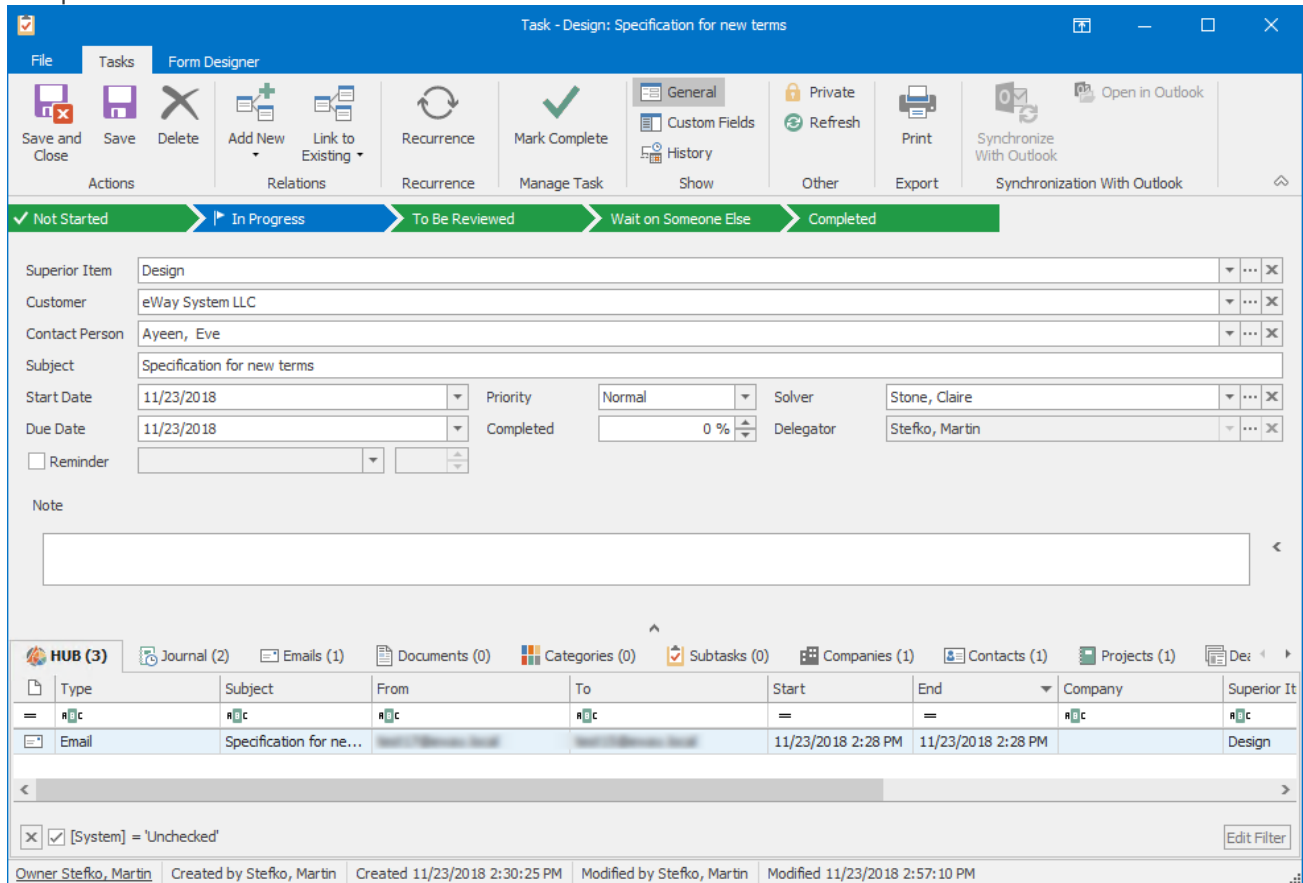


4. Set a date or choose *Custom*.



3.8 How to Set a Task Reminder

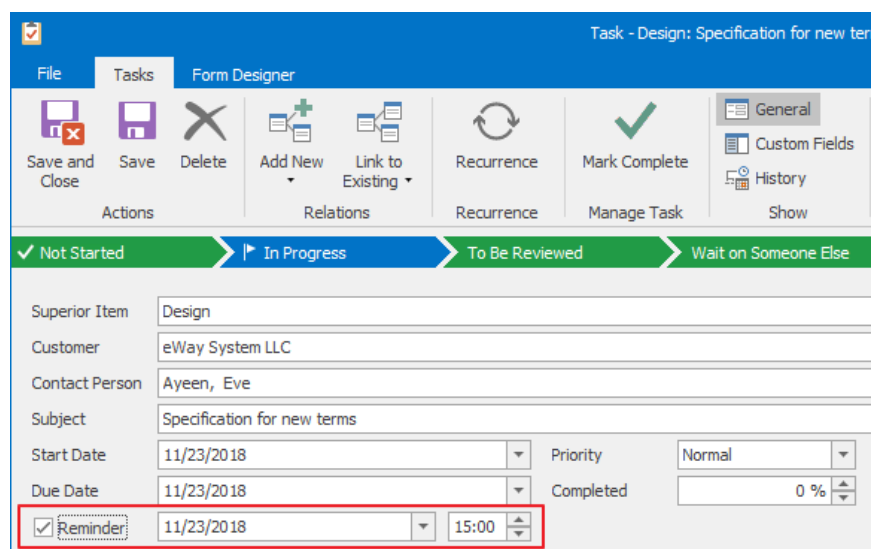
1. Open a task.



The screenshot shows the 'Task - Design: Specification for new terms' form in the eWay CRM. The 'Not Started' status is selected. The form includes fields for Superior Item (Design), Customer (eWay System LLC), Contact Person (Ayeen, Eve), Subject (Specification for new terms), Start Date (11/23/2018), Due Date (11/23/2018), Priority (Normal), Solver (Stone, Claire), and Delegator (Stefko, Martin). The 'Reminder' checkbox is unchecked. Below the form is a table showing the task details.

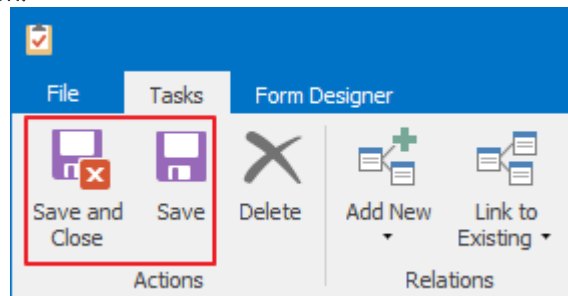
Type	Subject	From	To	Start	End	Company	Superior It
Email	Specification for ne...	Stefko, Martin	Stefko, Martin	11/23/2018 2:28 PM	11/23/2018 2:28 PM	eWay System LLC	Design

2. Mark Reminder field and select date and time when the reminder is supposed to pop up.



The screenshot shows the same task form, but with the 'Reminder' checkbox checked and a date/time selected. The 'Reminder' field is highlighted with a red box, showing the date '11/23/2018' and the time '15:00'.

- Click Save or Save and Close button.

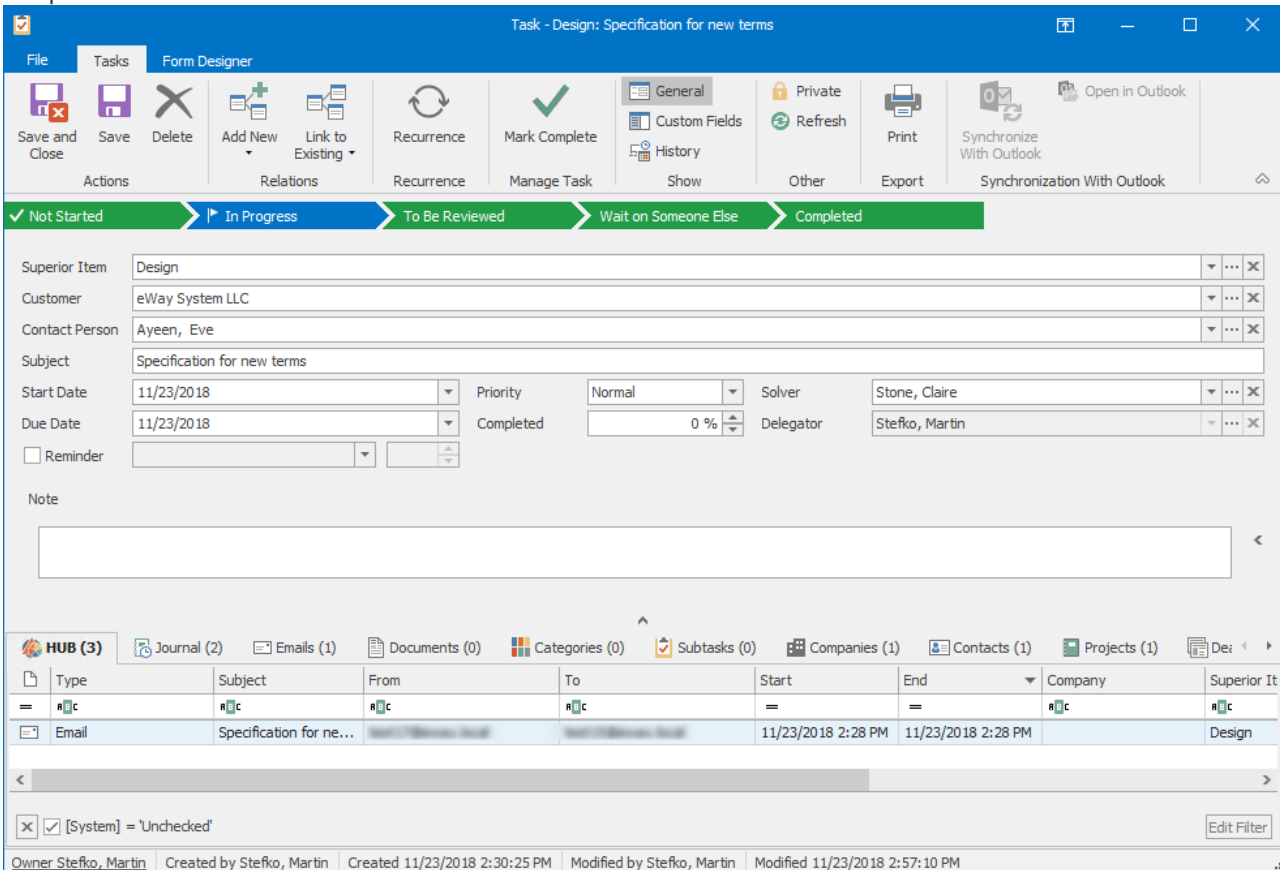


- A reminder can be set in the set date and time. The reminder window looks exactly the same as the one you are used to from Microsoft Outlook.

Note: Reminders work in eWay-CRM Mobile, too. Synchronization of data in eWay-CRM Mobile relies on the connection speed, whether you have permitted the possibility to synchronize using mobile data, and on the computing power given to eWay-CRM running in the background by the phone. Unfortunately, phones with iOS are at a disadvantage when it comes to this because they do not allow synchronization in the background.

3.9 How to Set Recurrence

- Open a task.



Task - Design: Specification for new terms

File Tasks Form Designer

Save and Close Save Delete Add New Link to Existing Recurrence Mark Complete General Custom Fields History Private Refresh Print Synchronize With Outlook Open in Outlook

Actions Relations Recurrence Manage Task Show Other Export Synchronization With Outlook

✓ Not Started In Progress To Be Reviewed Wait on Someone Else Completed

Superior Item Design

Customer eWay System LLC

Contact Person Ayeen, Eve

Subject Specification for new terms

Start Date 11/23/2018 Priority Normal Solver Stone, Claire

Due Date 11/23/2018 Completed 0 % Delegator Stefko, Martin

☐ Reminder

Note

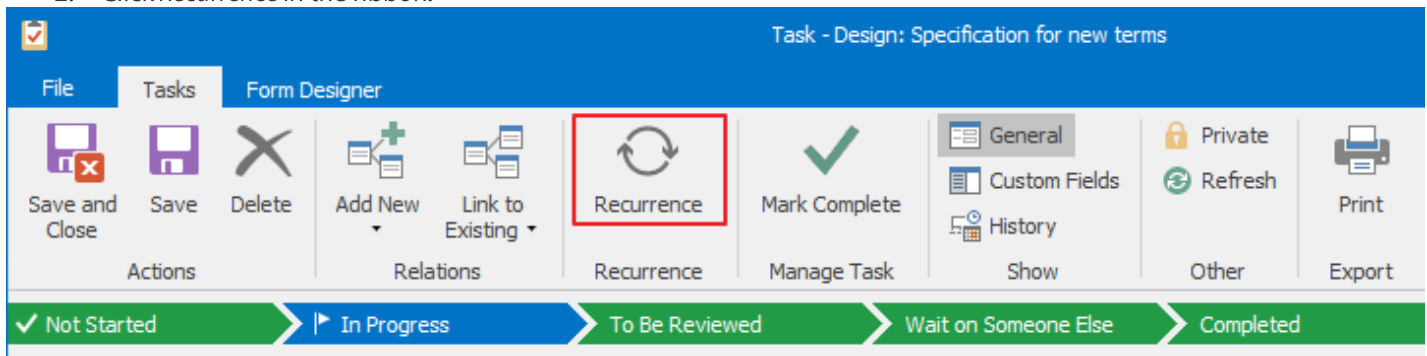
HUB (3) Journal (2) Emails (1) Documents (0) Categories (0) Subtasks (0) Companies (1) Contacts (1) Projects (1)

Type	Subject	From	To	Start	End	Company	Superior It
Email	Specification for ne...			11/23/2018 2:28 PM	11/23/2018 2:28 PM		Design

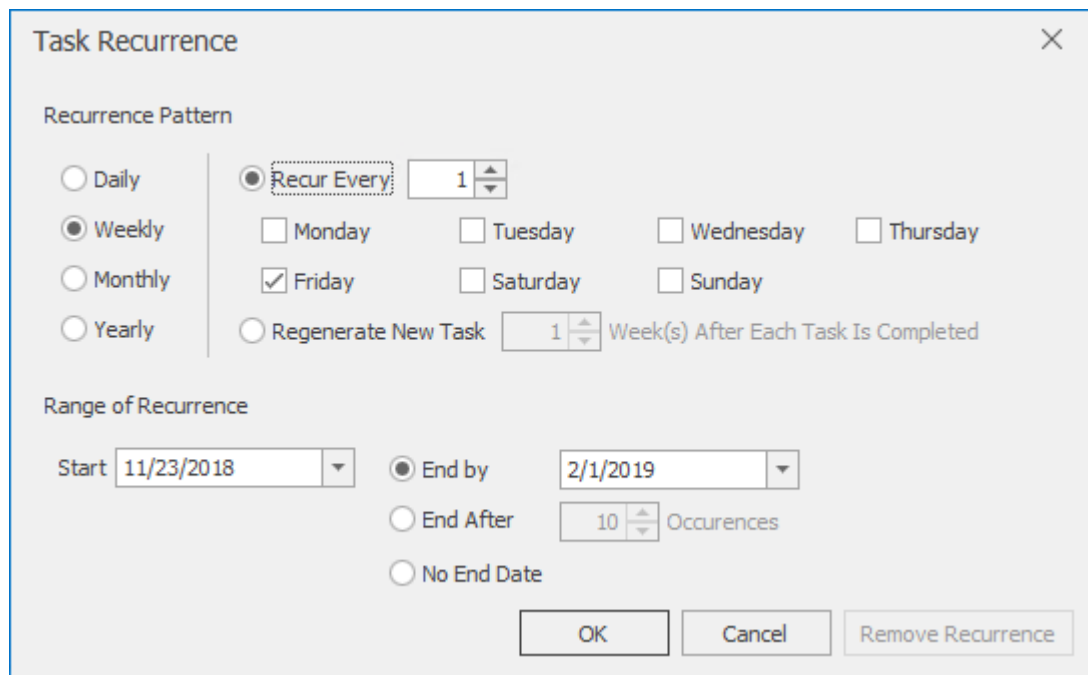
☒ [System] = 'Unchecked' Edit Filter

Owner Stefko, Martin Created by Stefko, Martin Created 11/23/2018 2:30:25 PM Modified by Stefko, Martin Modified 11/23/2018 2:57:10 PM

2. Click *Recurrence* in the ribbon.



3. Select the desired frequency – daily, weekly, monthly, yearly. Set additional parameters (e.g. each Monday). You can also set that the recurrence will stop automatically after 10 repetitions.



The 'Task Recurrence' dialog box is shown. It has a 'Recurrence Pattern' section with radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Weekly' option is selected. Under 'Weekly', there are checkboxes for 'Monday', 'Tuesday', 'Wednesday', 'Thursday', 'Friday', 'Saturday', and 'Sunday'. The 'Friday' checkbox is checked. There is also a 'Recur Every' field with a value of '1' and a 'Regenerate New Task' option with a value of '1' and a label 'Week(s) After Each Task Is Completed'. The 'Range of Recurrence' section has a 'Start' date of '11/23/2018' and three options for 'End by', 'End After', and 'No End Date'. The 'End by' option is selected with a date of '2/1/2019'. The 'End After' option has a value of '10' and a label 'Occurrences'. At the bottom are 'OK', 'Cancel', and 'Remove Recurrence' buttons.

4. Click *OK*.

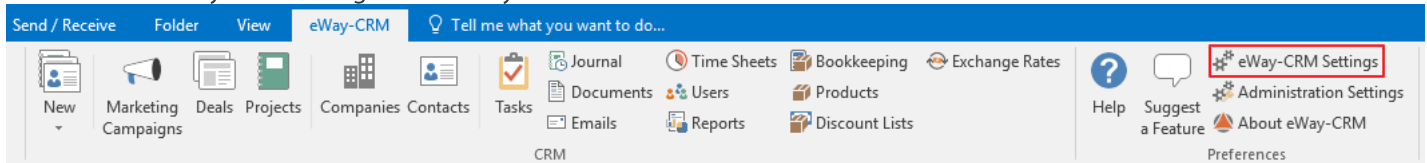
Note: If you mark a repeating task in eWay-CRM as finished, we actually create a "copy" and set a new due date. The "original" task remains in the database, so that it's possible to track who finished it and when.

3.10 How to Synchronize Tasks with Outlook

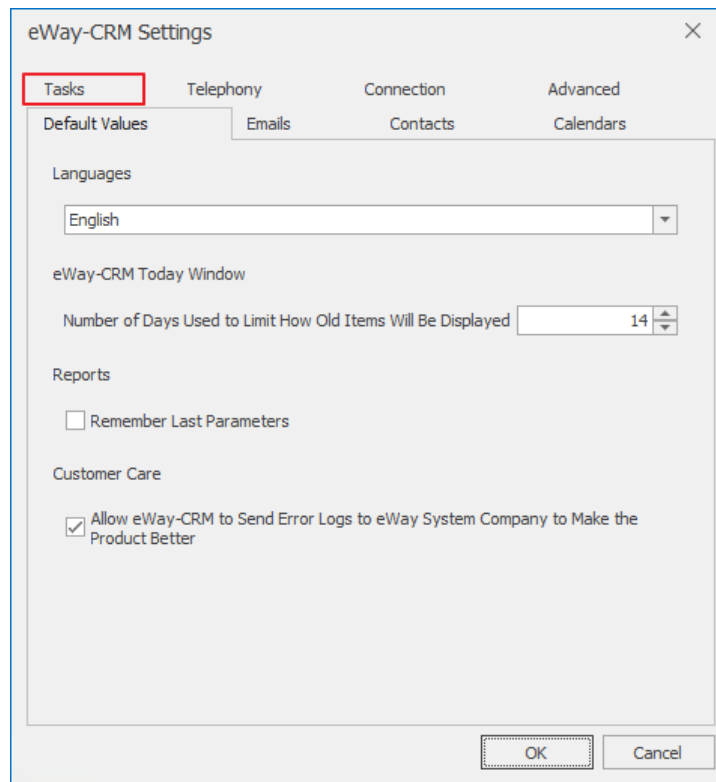
If you insist on synchronizing tasks into Outlook despite all the benefits of our new module, we have prepared two ways for you to do it.

3.10.1 Automatic Synchronization of All Tasks

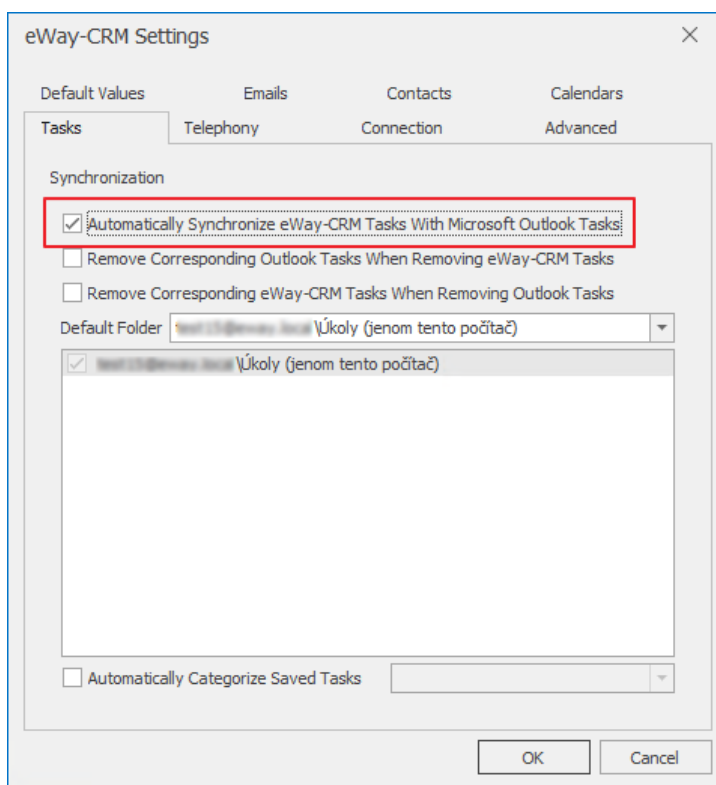
1. Click eWay-CRM Settings in the eWay-CRM ribbon in Outlook.



2. Go to Tasks tab.



3. Select the *Automatically Synchronize eWay-CRM Tasks with Microsoft Outlook Tasks* check box.

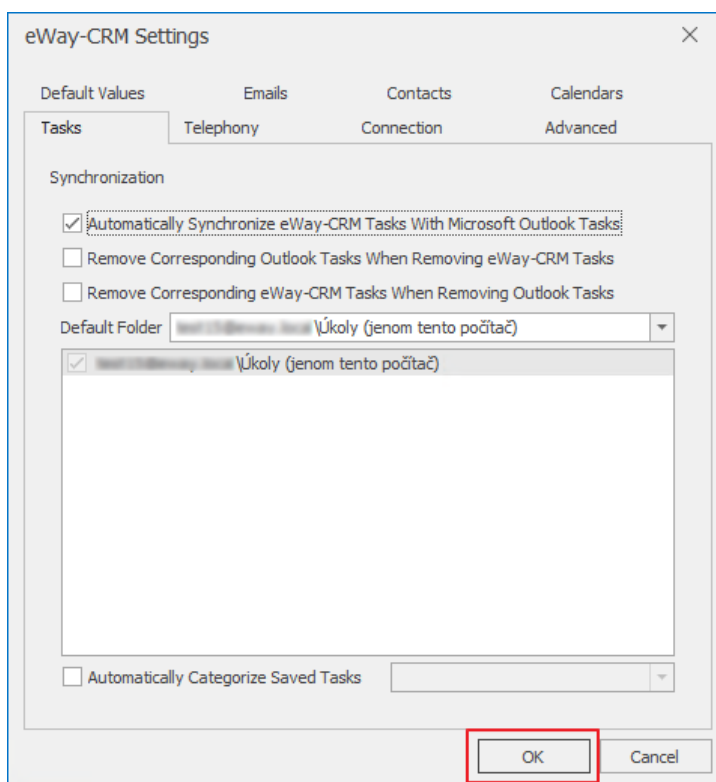


The image shows the 'eWay-CRM Settings' dialog box with the 'Tasks' tab selected. The 'Synchronization' section contains the following options:

- ☒ Automatically Synchronize eWay-CRM Tasks With Microsoft Outlook Tasks
- ☐ Remove Corresponding Outlook Tasks When Removing eWay-CRM Tasks
- ☐ Remove Corresponding eWay-CRM Tasks When Removing Outlook Tasks

The 'Default Folder' is set to 'H:\eWay-CRM\Tasks\Úkoly (jenom tento počítač)'. Below this, a list of folders is shown with the same path selected. At the bottom, there is an 'Automatically Categorize Saved Tasks' checkbox and a dropdown menu. The 'OK' and 'Cancel' buttons are at the bottom right.

4. Click OK.








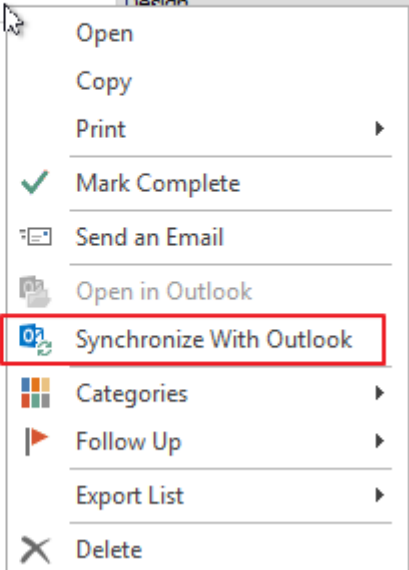
This image is identical to the previous one, showing the 'eWay-CRM Settings' dialog box with the 'Tasks' tab selected. The 'Synchronization' section contains the same options as before. The 'OK' button at the bottom right is highlighted with a red rectangle.







5. After restarting Outlook, your tasks (where you are the solver) will be saved from eWay-CRM to Outlook. If they have already been there, they will only update. Outlook tasks with Superior Item filled will be updated and those without Superior Item filled will stay only in Microsoft Outlook.

3.10.2 Synchronization of Selected Tasks

1. In eWay-CRM tasks list, select one or more tasks.
2. Right-click them.
3. Choose Synchronize with Outlook.

Customer	Contact Person	Superior Item
 a c	 ayee	 de
 eWay System LLC	Ayeen, Eve	Design
 eWay System LLC	Ayeen, Eve	Design

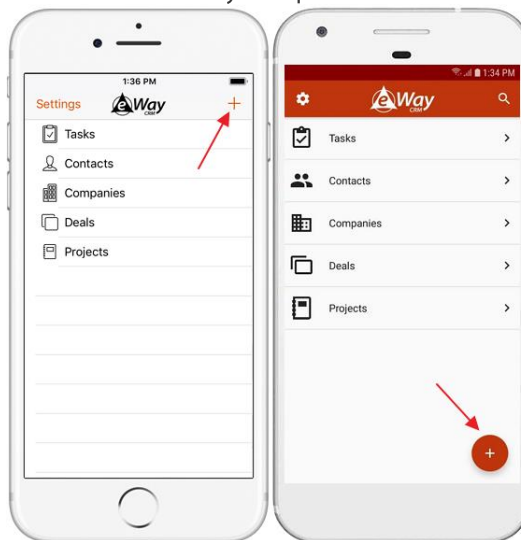


- Open
- Copy
- Print
- ✓ Mark Complete
-  Send an Email
-  Open in Outlook
-  **Synchronize With Outlook**
-  Categories
-  Follow Up
- Export List
-  Delete

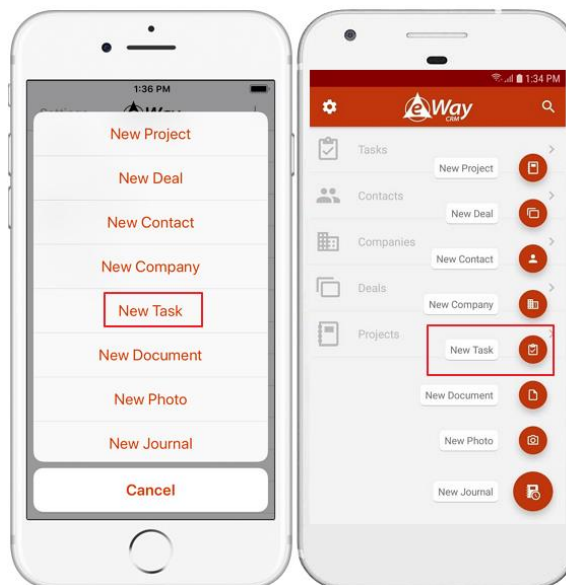
4 Basic Work with Tasks in eWay-CRM Mobile

4.1 How to Create a Task in eWay-CRM Mobile

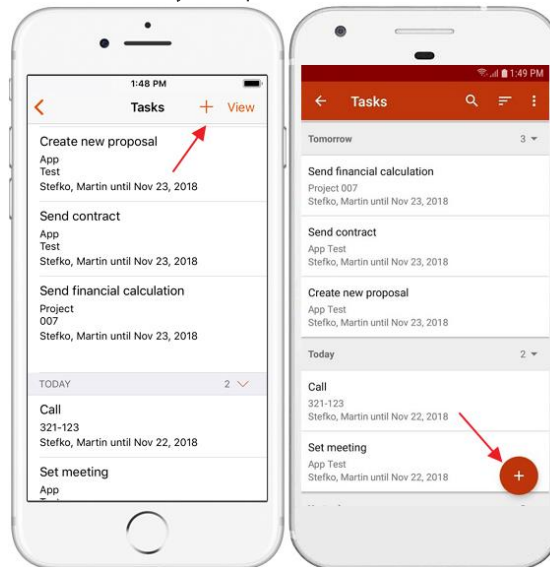
1. You can create a task right in the main menu when you tap +.



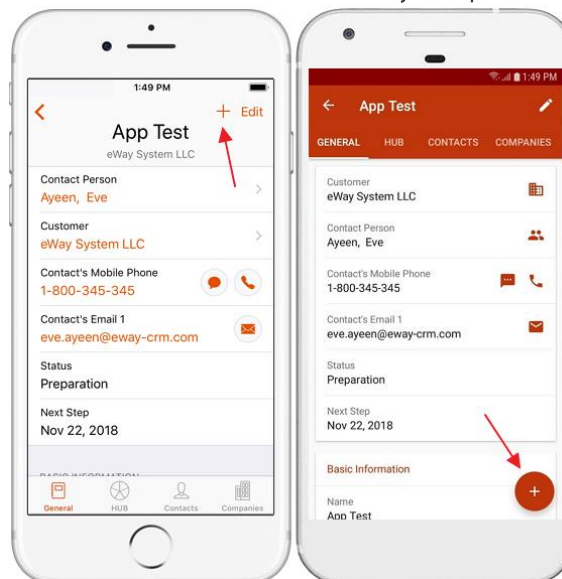
2. Then, select *New Task*.



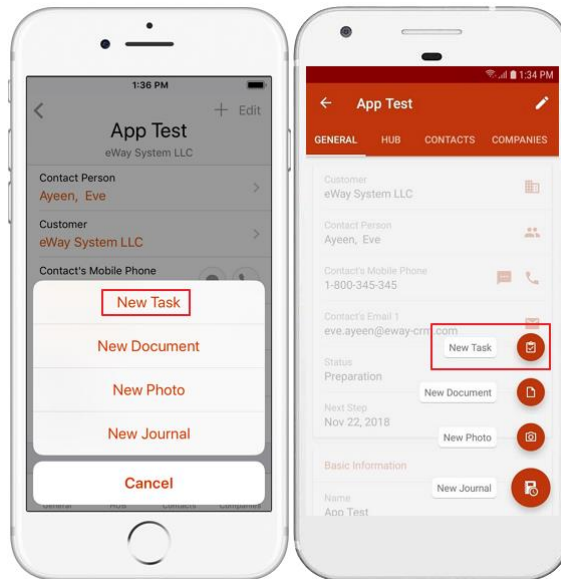
3. Tasks can be also added in the Task list when you tap the + icon.



4. You can also create a new task in the item detail or its HUB when you tap the + icon.

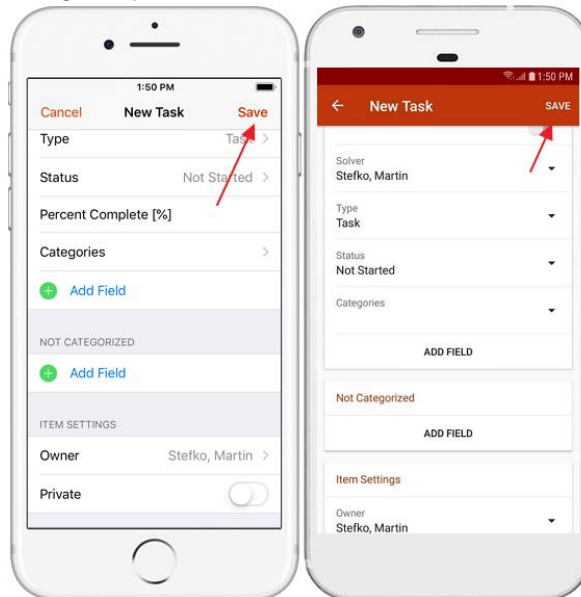


5. Then select *New Task*.



6. Whatever way you choose, the detail of a new task will be opened and it's up to you which fields you fill in. If you created the task from another item, some data will be pre-filled (*Superior Item*, *Customer*, or *Contact Person*).

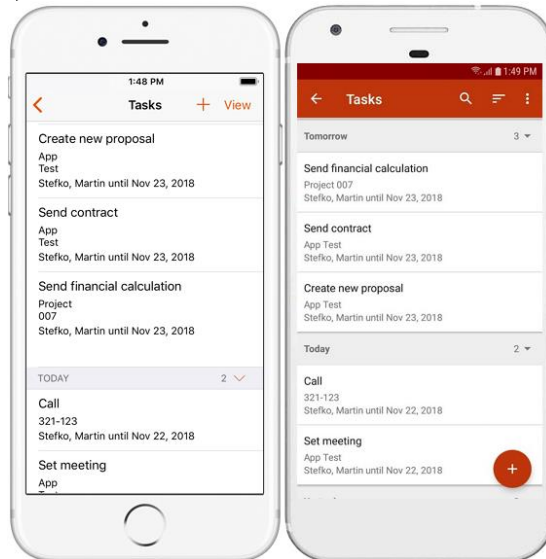
7. If you are satisfied with your changes, tap *Save*.



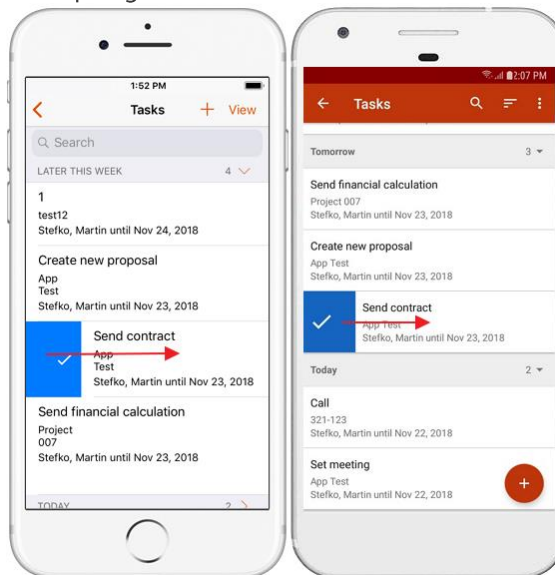
4.2 How to Mark a Task as Completed

Tasks can be completed through the standard workflow transfer to *Completed* when editing the task. However, eWay-CRM Mobile offers an easier way, too. You can simply:

1. Go to task list and find the task you have finished.



2. Hold your finger on the task and swipe right.

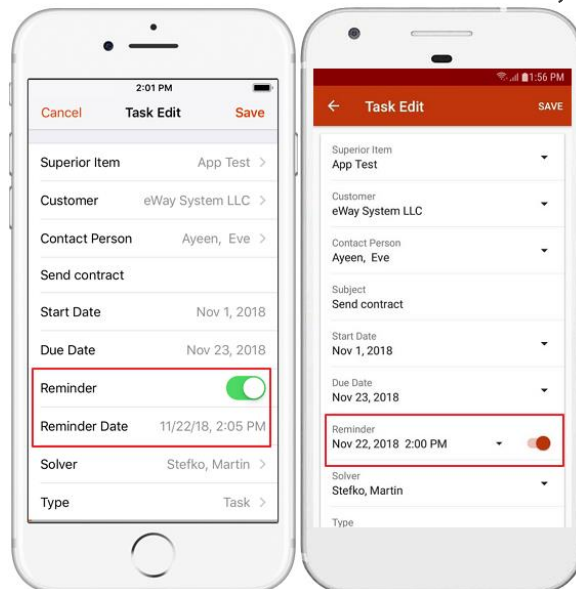


3. Task has been marked as completed.

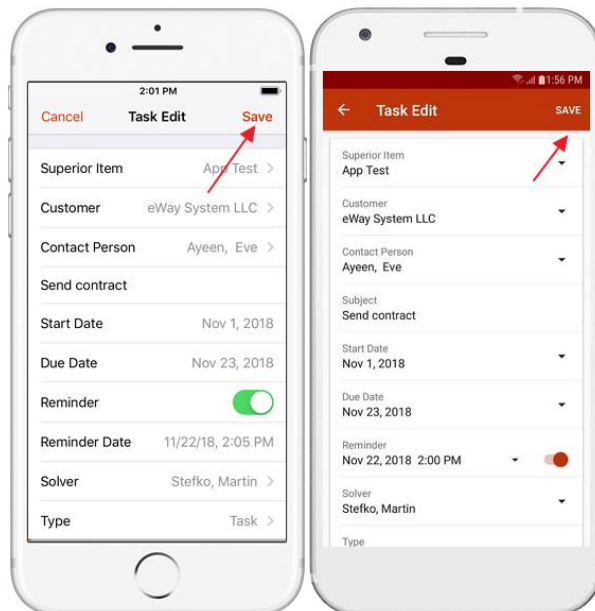
Note: Only tasks that meet all requirements can be completed this way. The user must have a permission to move the task to Completed status. All conditions related to actions on workflow are met.

4.3 How to Add Reminder to Task

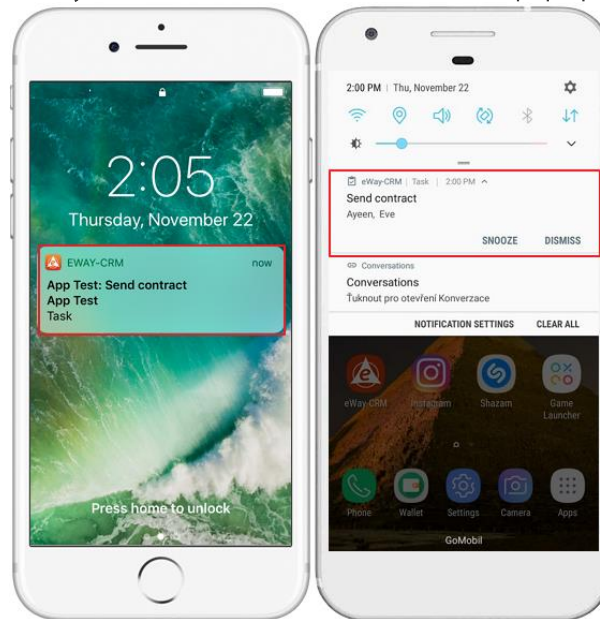
1. Go to the dialog for creating new task (see [How to Create a Task in eWay-CRM Mobile](#)).
2. When creating a task, you need to set a *Reminder*. Select a date and time when you want the reminder to pop up.



3. Save the task.



4. If the task hasn't been completed yet in the selected time, a reminder will pop up to remind you to complete the task.



5 What else? New tasks, new possibilities

With the Tasks module, you have now brand new possibilities. As it is a full-featured eWay-CRM module, you can use all the features you are used to in our system:

1. You can set different types of tasks. More at <https://www.eway-crm.com/how-to-start-using-outlook-crm/create-new-workflow/>.
2. You can change the workflow of a task or set mandatory fields. More at <https://www.eway-crm.com/how-to-start-using-outlook-crm/customize-default-workflow/>.
3. You can create custom fields. More at <https://www.eway-crm.com/how-to-start-using-outlook-crm/create-custom-fields/>.
4. You can customize task dialogs. More at https://kb.eway-crm.com/documentation/3-description/3-3-item-working-window/customize-dialogs-with-form-designer?set_language=en
5. You can categorize tasks. Are you familiar with GTD?
6. You can easily send an e-mail to a client from a task. Right-click the task and select *Send e-mail*.
7. You can use the prepared views for easy task sorting.
8. You can work with tasks in eWay-CRM Mobile, too.
9. You can use our API and let your apps create tasks in eWay-CRM. More at https://kb.eway-crm.com/documentation/6-add-ins/6-7-api-1?set_language=en