

# 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 <u>How to Create Grid</u> <u>Reports</u>).

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'	*	RBC			R B C			R B C			RBC		RBC
2	2										New contract		
492	2										Specification for	new terms	

## 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.

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Not Started	In Progress	To Be Review	ed 🔰 Wait or	Someone Else	Completed				
	Design								×
Customer	eWay System LLC							-	··· ×
Contact Person	Ayeen, Eve							Ψ.	··· ×
Subject	Send new calculation								
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Due Date	11/23/2018	▼ Co	ompleted	0 %	Delegator	Stefko, Martin		Ψ.	··· ×
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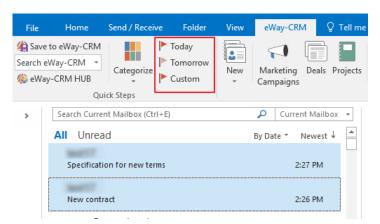
## 2.3 Context Menu in a Microsoft Outlook E-mail

In the context menu of an e-mail, you can see a button called Convert to Task. For more information, see <u>How to Convert E-mail</u> to Task.

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ļ	Convert to Deal	
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## 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 <u>How to QUICKLY Convert E-mail to</u> <u>Task</u>.



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.



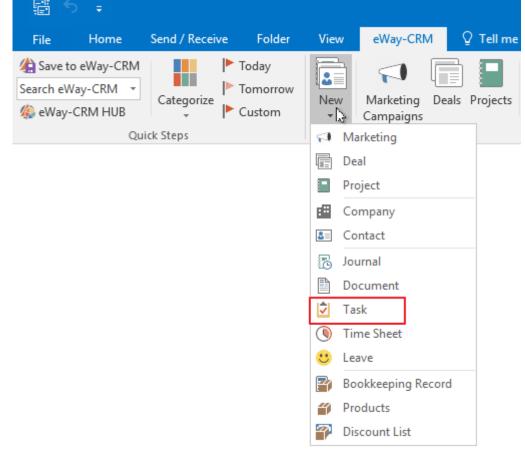
If you still want to create tasks in Outlook, everything remains the same – choose a Superior Item, the tasks save to eWay-CRM and will keep synchronizing.

# 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.

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Superior Item	Design											_	x
Customer	eWay System L	LLC											x
Contact Person	Ayeen, Eve											*	··· x
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3. Click Save or Save and Close icon.



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

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Priority		Normal						*

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.

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Contact Pe	erson	Ayeen, Ev	e												• ×
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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.

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- 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.

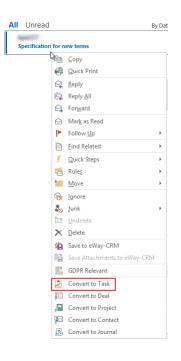
H							М	ake a call about new	terms - Task
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Close				Complete	Task	Report		v Up +	Low Importance
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#### 3.4 How to Convert E-mail to Task

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.

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File Tasks	Form D	esigner											
Save and Save	Delete	Add New Link to	Recurrence	Mark Con	nolete	General Custom Fields	<table-cell> Private 🎯 Refresh</table-cell>	Print	Synchronize With Outlook		n in Outlook		
Actions		Relations	Recurrence	Manage	Task	Show	Other	Export	Synchroni	zation With	Outlook		$\diamond$
Not Started	$\rightarrow$	In Progress	To Be Review	ed	📏 Wait o	n Someone Else	Completed						
Superior Item	Design											-	x
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Owner Stefko, Mar	tin Create	d by Stefko, Martin	Created 11/23/2018 2	:30:25 PM	Modified by	/ Stefko, Martin	Modified 11/23/20	18 2:30:25 F	м				



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

4	HUB (1) 🛛 🐻 J	ournal (0) 🖃 E	imails (1)	Documents (0)	Categories (0)	🕏 Subtasks (0	)) 🔛 Companie	s (0) 🔠 Contacts (0)	Proje	cts (0) 📑 🛙	Dea 🔍 🕨
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=•	Design		Specif	fication for new terms		test ("Beness in	100	test (Tight-as local	1	1/23/2018 2:28	8:00 PM
-											
Owne	er Stefko, Martin	Created by Stefko,	, Martin 🛛 🕻	Created 11/23/2018 2:30	0:25 PM Modified b	y Stefko, Martin	Modified 11/23/20	18 2:30:25 PM			

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

<b>H</b> 5	C 🛧 📢	÷					Specification for ne	ew terms - I	vlessage (HT	ML)		ħ			×
File	Message	♀ Tell n	ne what y	you want	to do										
Delete Respo	ond Quick	Move *	Tags	P Editing	Q Zoom	Save to eWay-CRM	Save Attachments to eWay-CRM	GDPR Relevant	Categorize	<ul> <li>Today</li> <li>Tomorrow</li> <li>Custom</li> <li>eWay-CRM</li> </ul>	Convert to I	Project	Conver	t to Journal	

## 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.

Search Current Mailbox (Ctrl+E)	P	Curr	rent Mailbox
All Unread	By Da	te *	Newest ↓
Specification for new terms			2:27 PM
New contract			2:26 PM



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

File	Home	Send / Receive	Folder	View	eWay-CR	M	🖓 Tell me
Search	ve to eWay-CRM eWay-CRM /ay-CRM HUB Qu	Categorize	Today Tomorrow Custom	New	Marketing Campaigns		Projects
>	All Unrea	nt Mailbox (Ctrl+E) ad ion for new terms			By Date 🔹	2:27 PM	↓ ▲
	New cont	ract				2:26 PM	

- 3. E-mail is automatically converted to task and related to the task. E-mail can be found in the task window.
- 4. In the Tasks module, you can get back to task and fill in details if you need to.

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Qu	iick Steps						(	RM			
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1	Ê R∎C		RBC			RBC			RBC		RBC
492	<b>V</b>								New contract Specification for	new terms	



#### 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*.

🖄 Save Email to e	Way-CRM	×
Superior Item	Design 🔻	×
Categories		-
Follow Up		-
GDPR Relevant		
	OK Cancel	

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

🕸 Save Email to e	Way-CRM	×
Superior Item	Design 💌 …	x
Categories		*
Follow Up	11/30/2018	•
GDPR Relevant		
	OK Cancel	

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.

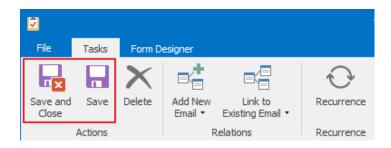
1. Open a task		
Task - Design: Specification for new terms 🕅 —		×
File Tasks Form Designer		
Image: Save and Close       Save Delete       Add New Link to Email • Existing Email •       Recurrence       Mark Complete       Image: Close       Image: Close       Image: Close       Private       Image: Close       <	Outloo	k
Actions Relations Recurrence Manage Task Show Other Export Synchronization With Ou	tlook	$\diamond$
Not Started In Progress To Be Reviewed Wait on Someone Else Completed		
Superior Item Design	-	×
Customer eWay System LLC	-	x
Contact Person Ayeen, Eve	-	x
Subject Specification for new terms		
Start Date 11/23/2018   Priority Normal  Solver Stefko, Martin	-	··· ×
Due Date 11/23/2018  v Completed 0 % 🔺 Delegator Stefko, Martin	~	··· ×
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E Design Specification for new terms 11/23/20	18 2:28	8:00 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.

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Not Star	ted	>	In Progress	<u> </u>	To Be Rev	viewed	Wait	on Someone Else	Completed				
											•		
Superior I	tem	Design										*	··· x
Customer		eWay Syste	em LLC									*	··· x
Contact P	erson	Ayeen, Ev	e									-	··· ×
Subject		Specificatio	n for new te	rms									
Start Date	2	11/23/2018	3		*	Priority	Normal	•	Solver	Stone, Claire		-	··· x
Due Date		11/23/2018	3		*	Complet	ed	0 % 🚖	Delegator	Stefko, Martin		Ψ.	··· ×
Remin	der			<b>•</b>	* *								

#### 3. Save it.



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	<b>Way</b>
Subject: <u>Specification for new terms</u> Start Date: 11/23/2018 Due Date: 11/23/2018 Delegator: <u>Stefko, Martin</u> Solver: <u>Stefko, Martin</u> Superior Item: <u>Design</u> Company: <u>eWay System LLC</u> Note:	

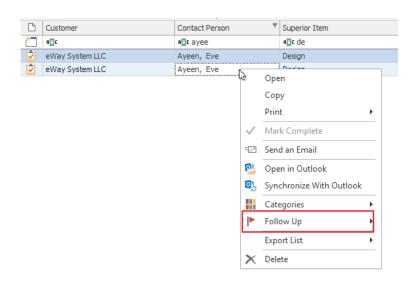
Generated by eWay-CRM system.

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.

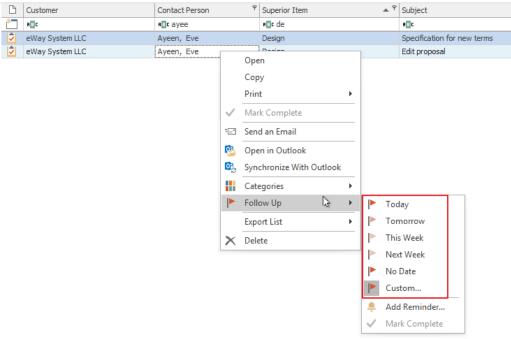


## 3.7 How to Bulk Change Due Date of Tasks

- 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

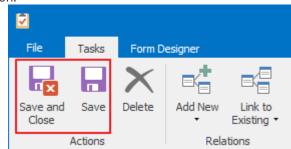
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2						Task - D	Design: Specifi	cation for new te	erms			<b>m</b> –			×
File	Tasks	Form De	esigner												
Save and Close	d Save	X Delete	Add New	Link to Existing •	Recurrence	Mark Cor	molete	General Custom Fields	🔒 Private 🕝 Refresh	Print	Synchronize With Outlook		Outlook		
	Actions		Relat	ions	Recurrence	Manage	Task	Show	Other	Export	Synchroni	ization With Out	tlook		$\sim$
🗸 Not Sta	arted		In Progress	s	To Be Revi	ewed	Wait or	n Someone Else	Completed						
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Custome		eWay Syste												<b>T</b>	
		Ayeen, Eve												<b>+</b>	·×
Subject			n for new terr	ns											
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Due Dat	te 🛛	11/23/2018			<b>T</b>	Completed		0 %	Delegator	Stefko, Ma	artin				• ×
Rem	ninder				▼ <u>▲</u>										
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ВТу	/pe		Subject		From		То		Start	End	•	Company		Supe	erior It
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E Em	nail		Specification	n for ne	territ filmente in	100	test (Tight-1)	a locali	11/23/2018 2:28	PM 11/23	/2018 2:28 PM			Desi	ign
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2. Mark Reminder field and select date and time when the reminder is supposed to pop up.

2					Task - Desi	gn: Specification for new terr
File Tasks	s Form D	esigner				
Save and Save		Add New	Link to Existing •	Recurrence	Mark Comple	ete General General Custom Fields Gim History
Actions	S	Relati	ons	Recurrence	Manage Ta	sk Show
✓ Not Started	<u>&gt;</u>	In Progress	;	To Be Rev	iewed	Wait on Someone Else
Superior Item Customer Contact Person Subject	Design eWay Syst Ayeen, Ev Specificatio		ns			
Start Date	11/23/2018	3		*	Priority	Normal 🔻
Due Date	11/23/2018	3		-	Completed	0 % 📥
Reminder	11/23/2018	3	-	15:00 🔺		



3. Click Save or Save and Close button.



4. 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

1.	Open a ta	ask.								
Ż					Task - Design	: Specification for new te	rms		<u>m                                    </u>	⊐ ×
	File Tasks	Form D	esigner							
	ave and Save	Delete	Add New Link to	Recurrence	Mark Complete	E General Custom Fields G History	😂 Refresh	Print Synchronize With Outlook		
	Actions		Relations	Recurrence	Manage Task	Show	Other E	xport Synchron	ization With Outlook	$\diamond$
~	Not Started		In Progress	To Be Review	ved >	Wait on Someone Else	Completed			
5	Superior Item	Design								* ··· X
c	Customer	eWay Syste	em LLC							* ··· X
c	Contact Person	Ayeen, Eve	e							* ··· X
5	Subject	Specificatio	n for new terms							
s	Start Date	11/23/2018	}	▼ Pi	riority	Normal 🔻	Solver St	one, Claire		* ··· X
C	Due Date	11/23/2018	}	- C	ompleted	0 % 📥	Delegator St	efko, Martin		- ··· X
[	Reminder			<b>v</b>						
	Note									
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						^				
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[	🗅 Туре		Subject	From	То		Start	End 🔻	Company	Superior It
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	Email		Specification for ne	test : "Broan had	1 100	Concerning and	11/23/2018 2:28 PM	11/23/2018 2:28 PM		Design
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2	K 🔽 [System] :	= 'Unchecked	5							Edit Filter
Ov	vner Stefko, Mar	tin Create	d by Stefko, Martin	Created 11/23/2018 2	:30:25 PM Mod	dified by Stefko, Martin	Modified 11/23/2018	2:57:10 PM		



2. Click Recurrence in the ribbon.

2						Task - Design: S	pecification for new ter	ms	
File	Tasks	Form D	esigner						
Save and Close	Save	<b>X</b> Delete	Add New	Link to Existing •	Recurrence	Mark Complete	General Custom Fields	🔒 Private 🎯 Refresh	Print
	Actions		Rela	itions	Recurrence	Manage Task	Show	Other	Export
✓ Not Started		▶ In Progress			To Be Review	ved 💙 W	/ait on Someone Else	Completed	

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.

Task Recurren	ice ×
Recurrence Patte	ern
🔿 Daily	Recur Every
Weekly	Monday Tuesday Wednesday Thursday
<ul> <li>Monthly</li> </ul>	Friday Saturday Sunday
O Yearly	O Regenerate New Task 1 🔺 Week(s) After Each Task Is Completed
Range of Recurre	ence
Start 11/23/20	118 ▼ ● End by 2/1/2019 ▼
	O End After 10 - Occurences
	O No End Date
	OK Cancel Remove Recurrence

#### 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.

Send / Receive Folder View	eWay-CRM Q Tell	me what you want to do	
New Campaigns		Image: Solution of the sector of the sect	Image: CRM Settings         Help       Suggest         a Feature       ▲ About eWay-CRM         Preferences

2. Go to Tasks tab.

eWay-CRM Setti	ings			$\times$
Tasks	Telephony	Connection	Advanced	
Default Values	Emails	Contacts	Calendars	
Languages				
English				•
eWay-CRM Today	y Window			
Number of Days	Used to Limit How	Old Items Will Be Displaye	ed 14	*
Reports				
Remember L	ast Parameters			
Customer Care				
Product Bet	-CRM to Send Error ter	Logs to eWay System Co	ompany to Make the	
			OK Can	cel
1		<u>L</u>		



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

eWay-C	RM Sett	ings			×
Default	Values	Emails	Contacts	Calendars	
Tasks		Telephony	Connection	Advanced	
Synchr	onization				
		ly Synchronize eWay-CR			
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	test 15 @ex	\Úkoly (jenom te	ento počítač)		
A 1	utomatical	ly Categorize Saved Tasł	s		Ŧ
				OK Ca	ancel

#### 4. Click OK.

(	eWay-CRM Set	tings			×
	Default Values	Emails	Contacts	Calendars	
	Tasks	Telephony	Connection	Advanced	
	Synchronization				
	🗸 Automatica	lly Synchronize eWay	-CRM Tasks With Micros	oft Outlook Tasks	
	Remove Co	rresponding Outlook	Tasks When Removing	eWay-CRM Tasks	
	Remove Co	rresponding eWay-Cl	RM Tasks When Removi	ng Outlook Tasks	
	Default Folder	head 15 generate include	Úkoly (jenom tento počí	tač)	-
		\Úkoly (jeno	m tento počítač)		
	Automatica	lly Categorize Saved	Tasks		Ŧ
L					
			L	OK Ca	ancel



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.

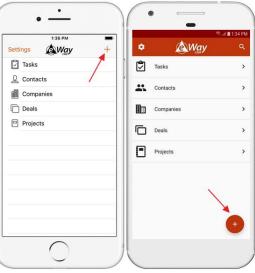
$\square$	Customer	Contact Person		Ŷ	Superior Item		₹ ا
*	RBC	Rec ayee			n∎c de		
2	eWay System LLC	Ayeen, Eve			Design		
2	eWay System LLC	Ayeen, Eve	3		Design		
			15	Оре	in		
				Сор	у		
				Prin	t	•	
			$\checkmark$	Mar	k Complete		
				Sen	d an Email		
			12	Оре	en in Outlook		
			07	Syn	chronize With Outlook		
				Cate	egories	•	
				Foll	ow Up	•	
				Expo	ort List	•	
			×	Dele	te	_	



# 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.

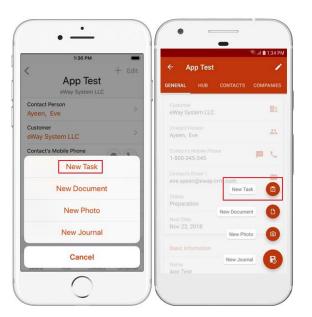
	1:48 PM	-	ו ו			® al 🖬 1	:49
< C	Tasks	+ View		← Tasks	م		
Create new pro	posal	*	Тс	morrow			3
App Test Stefko, Martin unti	il Nov 23, 201	8	Pr	end financial calcu oject 007			
Send contract			st	efko, Martin until No	/ 23, 2018		
App				end contract			
Test Stefko, Martin unti	il Nov 23, 201	8		op Test efko, Martin until No	/ 23, 2018		
Send financial o	alculation		C	reate new proposa	I		
Project 007				op Test			
Stefko, Martin unti	il Nov 23, 201	8	st	efko, Martin until No	/ 23, 2018		
			To	oday			2
TODAY		2 🗸	C	all			
Call				21-123	00.0010		
321-123			St	efko, Martin until No	22, 2018	-	
Stefko, Martin unti	I Nov 22, 201	8		et meeting		X	_
Set meeting				op Test efko, Martin until No	22, 2018	6	
App							

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

1:49 PM	← App Test
App Test eWay System LLC	GENERAL HUB CONTACTS COMPANIES
Contact Person Ageen, Eve	Customer eWay System LLC
Customer > eWay System LLC	Contact Person Ayeen, Eve
Contact's Mobile Phone	Contact's Mobile Phone 1-800-345-345
Contact's Email 1 eve.ayeen@eway-crm.com	Contact's Email 1 eve.ayeen@eway-crm.com
Status Preparation	Status Preparation
Next Step Nov 22, 2018	Next Step Nov 22, 2018
	Basic Information
General HUB Contacts Companies	Name App Test



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*.

1:50 PM		Stad 🗎 1:50 f
Cancel New Task Save	← New Task	SAV
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Status Not Started >	Solver Stefko, Martin	/-
Percent Complete [%]	Type Task	
Categories >	Status Not Started	-
Add Field	Categories	
NOT CATEGORIZED	ADD FIELD	
🕀 Add Field		
	Not Categorized	
ITEM SETTINGS	ADD FIELD	
Owner Stefko, Martin >		
Private	Item Settings	
$\nabla$	Owner	-
	Stefko, Martin	



## 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.

1:48 PM	_		🕏 al 💼 1:49 P
	+ View	← Tasks ଦ	₹ :
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App			
Test		Send financial calculation	
Stefko, Martin until Nov 23, 2018		Project 007 Stefko, Martin until Nov 23, 2018	
Send contract		Sterko, Marun unui Nov 23, 2018	
App		Send contract	
Test		App Test	
Stefko, Martin until Nov 23, 2018		Stefko, Martin until Nov 23, 2018	
Send financial calculation		Create new proposal	
Project		App Test	
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		Today	2 🔻
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321-123		Stefko, Martin until Nov 22, 2018	
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Set meeting		App Test Stefko, Martin until Nov 22, 2018	+
App		Sterky, martin until NOV 22, 2010	
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2. Hold your finger on the task and swipe right.

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~	Send contract App Test Stefko, Martin unt	til Nov 23, 2018	Stefko, Martin until Nov 2 Today	3, 2018
Send fina Project 007	ncial calculatio	n	Call 321-123 Stefko, Martin until Nov 22, 2018	
Stefko, Mar	tin until Nov 23, 2	:018	Set meeting App Test Stefko, Martin until Nov 22, 2018	G

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 <u>How to Create a Task in eWay-CRM Mobile</u>).
- 2. When creating a task, you need to set a *Reminder*. Select a date and time when you want the reminder to pop up.

	2:01 PM	-		Sal (
Cancel	Task Edit	Save	← Task Edit	
Superior Item	App 1	fest >	Superior Item App Test	
Customer	eWay System I	LLC >	Customer eWay System LLC	
Contact Perso	on Ayeen,	Eve >	Contact Person Ayeen, Eve	
Send contract	:		Subject	
Start Date	Nov 1	, 2018	Send contract	
Due Date	Nov 23	, 2018	Start Date Nov 1, 2018	
Reminder	(		Due Date Nov 23, 2018	
Reminder Dat	e 11/22/18, 2:	05 PM	Reminder Nov 22, 2018 2:00 PM	
Solver	Stefko, Ma	rtin >	Solver	
Туре	Т	ask >	Stefko, Martin	
			Туре	

3. Save the task.

2:01 PM			😤 al 🖬 1:56
Cancel Task Edit	Save	← Task Edit	SA
Superior Item	Apr Test >	Superior Item App Test	1.
Customer eWay S	System LLC >	Customer eWay System LLC	-
Contact Person	Ayeen, Eve >	Contact Person Ayeen, Eve	
Send contract		Subject	
Start Date	Nov 1, 2018	Send contract	
Due Date	Nov 23, 2018	Start Date Nov 1, 2018	•
Reminder		Due Date Nov 23, 2018	•
Reminder Date 11/2:	2/18, 2:05 PM	Reminder Nov 22, 2018 2:00 PM	
Solver Ste	fko, Martin 🗦	Solver	
Туре	Task >	Stefko, Martin	•
		Туре	



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 <u>https://www.eway-crm.com/how-to-start-using-outlook-crm/create-new-workflow/</u>.
- 2. You can change the workflow of a task or set mandatory fields. More at <a href="https://www.eway-crm.com/how-to-start-using-outlook-crm/customize-default-workflow/">https://www.eway-crm.com/how-to-start-using-outlook-crm/customize-default-workflow/</a>
- 3. You can create custom fields. More at <a href="https://www.eway-crm.com/how-to-start-using-outlook-crm/create-custom-fields/">https://www.eway-crm.com/how-to-start-using-outlook-crm/create-custom-fields/</a>
- 4. You can customize task dialogs. More at <u>https://kb.eway-crm.com/documentation/3-description/3-3-item-working-window/customize-dialogs-with-form-designer?set\_language=en</u>
- 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 <u>https://kb.eway-crm.com/documentation/6-add-ins/6-7-api-1?set\_language=en</u>