Associate Tasks

Introduction

The **Associate Tasks** feature allows you to create tasks for your staff to complete. Tasks can be created for specific associates or left open for any associate to complete.

When creating a task, you can choose to have the associate automatically notified via text or email. You can also assign a priority as well as categorize it.

Tasks can be added from the main menu or from other record types. Tasks created from other record types will retain a link to all related records (e.g. item, repair, customer, etc.).

Utilize the **Mass Task Wizard** to easily create tasks based on specific criteria, such as recent customer purchases, service work, and more. And define **Task Automation Rules** to automatically generate tasks when trigger conditions are met.

Tasks are integrated with both the **Store Calendar** and **Dashboards** features.

Contents

Settings

System Options

There are five system options for tasks.

Add Task Screen	When adding a task, choose whether to use the **Add Task Form** or **Add Task Wizard**. Additional options allow you to use the Form with a link to the Wizard and vice-versa.
Add Tasks on Start Date to Daily Email	Set this to True to have tasks appear on associate's **Daily Email** on the task's **Start Date**, otherwise it will show on the task's **Due Date**.
Send Daily Email of Tasks	Set this to True to send each associate a daily email of tasks due or starting today. If The Edge is running, the daily email is sent once each morning, otherwise it will send the next time the software is started.
New Task Default Notify	The default notification method used when creating a new task. Choose between email, SMS (text), both, or neither.
Task Lead Time	Task **Due Date** will default to this number of days in the future, e.g. enter 1 to always default due date to tomorrow.

Permissions

By default, an associate can create a task for themselves with no special permissions.

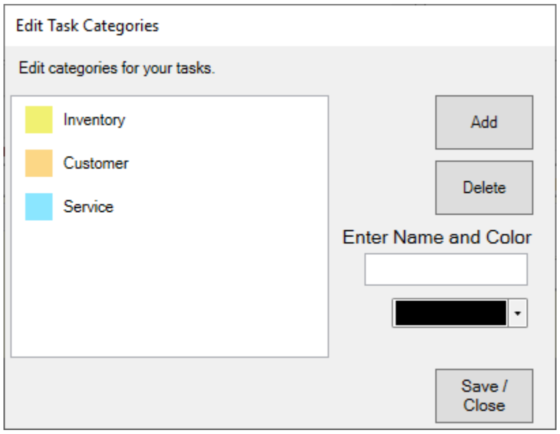
There are four associate permissions related to tasks.

Add a task for someone else	Allows you to create tasks for other associates as well as unassigned tasks that can be completed by anyone.
Add tasks with mass task wizard	Allows you to use the mass task wizard to add and manage batches of tasks.
Delete / Cancel a task with the mass task wizard	Allows you to delete tasks using the mass task wizard. Only tasks originally created with the wizard can be deleted.
Edit a task not assigned to you	Allows you to edit tasks assigned to other associates.

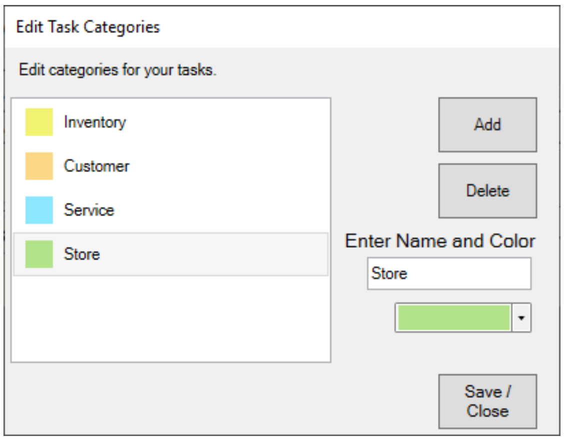
Task Categories

Categories can be setup to organize tasks. To create them:

1. Click **Administrative > Tasks > Categories**. The **Edit Task Categories** window will appear.



2. Click the **Add** button. **New Category** will appear in the list.
3. In the list, click on **New Category**, then enter a **Name** and choose a **Color**.



4. Make desired category changes, then click **Save/Close** to save them.

Text (SMS) Notifications

Text notifications can be automatically sent to associates when new tasks are created. To take advantage of this feature, you must be licensed to enable text notifications. Contact our **Administrative** department for more information: Admin@ajsllc.com.

Once enabled, notifications will be set for any task that has **Notify** set to **Text**. The system option **New Task Default Notify** controls whether this is enabled for new tasks by default.

By default, these text messages will send as “New Task created <Subject of Task>”

To customize this text:

1. Click **Administrative > Notifications > Text Messages.**
2. Click **Add**.
3. In the top right, use the **Notification Type** drop-down to select **Task New**.
4. Enter a **Title** and **Description**; these are NOT the content of the message, but just internal labels.

5. In **Text Input**, enter the content of the message. Use the **Merge Fields** on the right to dynamically insert text from the task. For example, the merge field {**AssociateName}** will put the associate's name in the text. The **Text Output Sample** window shows a preview of the text.
6. Click **OK / Save and Close**.
7. Click **Administrative > Notifications > Text Message Administration.**
8. Use the drop-down next to **New Task** to select the text template you created.
9. Click **OK / Save and Close**.

Email Notifications

Email notifications can be automatically sent to associates when new tasks are created. Additionally, a **Daily Email** can be sent that includes all tasks that are starting or due for the associate that day by enabling the **Send Daily Email of Tasks** system option.

To use this feature you must have a valid email account and configure The Edge to use it. For instructions, see Edge Email Setup.

Once enabled, notifications will be set for any task that has **Notify** set to **Email**. The system option **New Task Default Notify** controls whether this is enabled for new tasks by default.

NOTE: Notifications require a valid email address and/or cell phone number on the associate record.

Adding Tasks

There are five ways to create tasks:

Add Task

Opens task form allowing you to enter task details.

Task Wizard

Starts wizard that walks you through process of adding a single task.

Mass Task Wizard

Starts wizard that allows you to create and manage many tasks at once.

From Other Records

Tasks can be added from customers, items, service jobs (repairs, custom jobs, special orders, and appraisals), and POS. They will retain a link to all related records.

Task Automation Rules

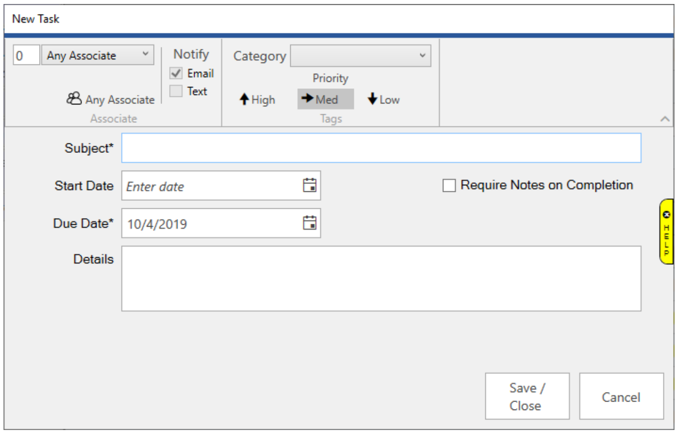
Define rules that will automatically generate tasks when trigger conditions are met.

NOTE: To create a single task that can be completed by multiple associates you must use the **Task Wizard** and check the **Selected Associate(s) Can Complete** option when choosing associates.

Add Task

This form allows you to add a single task. To use it:

1. Click **Associate > Tasks > Add**. The **New Task** window will appear.

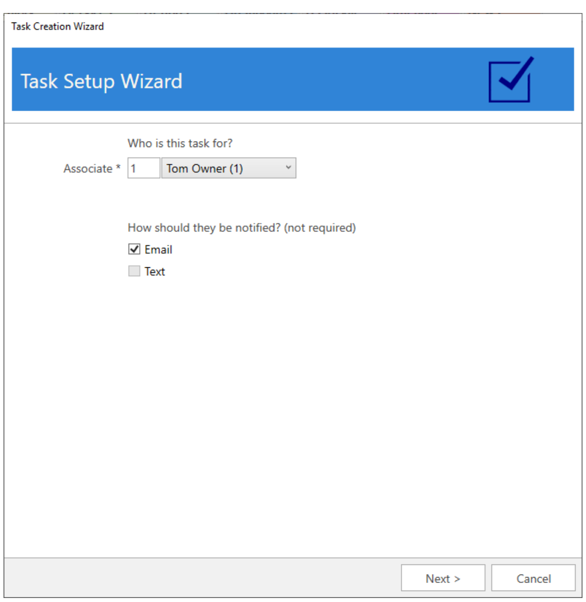


2. On the top left, choose the associate. Tasks created for **0 – Any Associate** can be completed by anyone.
3. Optionally, use the **Notify** setting to choose whether a notification should be automatically sent to the associate via email, text, or both.
4. Optionally, use the **Category** drop-down to select what type of task this is.
5. Optionally, choose the **Priority** level for this task. The default is **Medium**.
6. Optionally, choose a **Start Date**.
7. Enter a **Subject** and **Due Date**. These are the only two required fields.
8. Click **Save/Close** to save your task.

Task Wizard

The **Task Wizard** steps you through the process of adding a single task. To use it:

1. Click **Associate > Tasks > Task Wizard**. The **Task Creation Wizard** will appear.



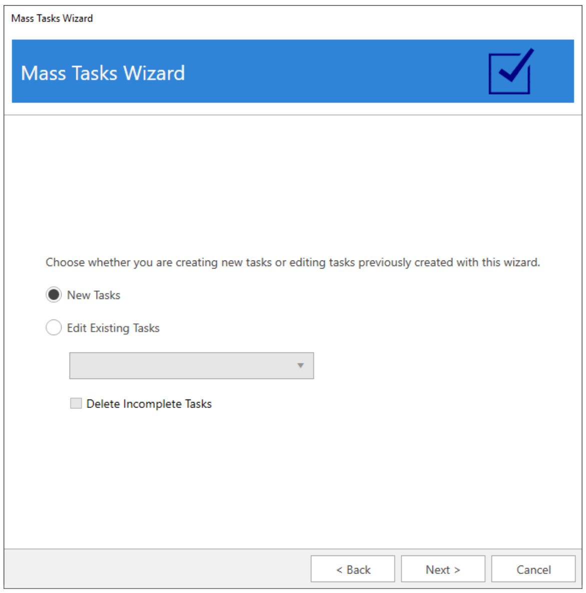
2. Follow the onscreen prompts and use the **Next** button to advance through the wizard.
3. When completed, click the **Finish** button.

Mass Task Wizard

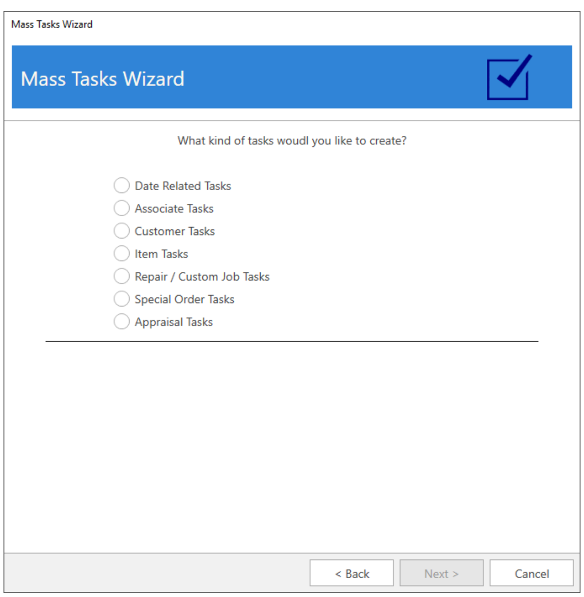
The **Mass Task Wizard** allows you to create many tasks at once. It can be used to create recurring tasks and has the capability to link tasks to customers, items, and service jobs. Tasks previously created with this wizard can also be updated or deleted en masse.

To use the wizard to create new tasks:

1. Click **Associate > Tasks > Mass Task Wizard.** The **Mass Tasks Wizard** will appear.



2. Select **New Tasks** and click **Next**.



3. There are seven types of tasks that can be created:

Date Related Tasks	Create tasks that repeat on a set schedule, i.e. **Daily**, **Weekly**, or **Monthly**. Weekly tasks allow you to select specific days. Monthly tasks allow you to repeat on a specific date (e.g. the 10th), the first day, or the last day of the month.
Associate Tasks	Create tasks for multiple associates at once.
Customer Tasks	Displays the **Customer Filter** allowing you to enter criteria to select customers. Results are displayed when you click **Next** and you can choose one or more customers to create and link tasks to.
Item Tasks	Displays the **Item Filter** allowing you to enter criteria to select items. Results are displayed when you click **Next** and you can choose one or more items to create and link tasks to.
Repair / Custom Job Tasks	Displays the **Job Filter** allowing you to enter criteria to select repair or custom jobs. Results are displayed when you click **Next** and you can choose one or more jobs to create and link tasks to.
Special Order Tasks	Displays the **Special Order Filter** allowing you to enter criteria to select special orders. Results are displayed when you click **Next** and you can choose one or more special orders to create and link tasks to.
Appraisal Tasks	Displays the **Appraisal Filter** allowing you to enter criteria to select appraisals. Results are displayed when you click **Next** and you can choose one or more appraisals to create and link tasks to.

4. Select the desired type of task, fill out any required fields (e.g. dates or filters), and click **Next**.
    a. Date tasks will bring you directly to **Task Details**.
    b. For tasks that utilize a filter, the matching records will be displayed. You must select one or more records before proceeding to **Task Details**.
5. **Task Details** required fields vary by type and are noted on screen with an asterisk.
6. Enter details, then click **Next** and **Finish** to create the tasks.

> **NOTE:** Notifications are not sent on tasks created with the **Mass Task Wizard**, however these tasks will appear on the **Daily Email**.

To use this wizard to update previously created tasks:

1. Click **Associate > Tasks > Mass Task Wizard.**
2. Select **Edit Existing Tasks** and use the drop-down to select the group of tasks you wish to update, then click **Next**.
3. **Task Details** will be displayed. Make any desired changes, then click **Next** and **Finish** to update existing incomplete tasks. Note that completed tasks will not be changed.

To use this wizard to delete tasks:

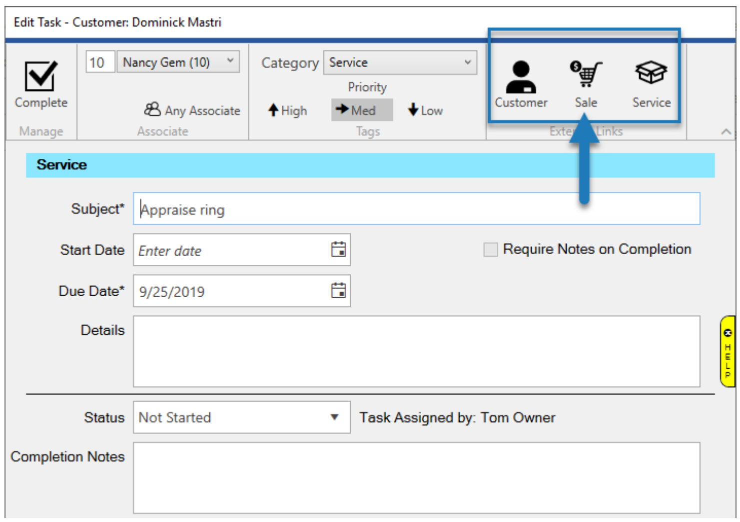
1. Click **Associate > Tasks > Mass Task Wizard**.
2. Select **Edit Existing Tasks**, use the drop-down to select the group of tasks you wish to delete, and check **Delete Incomplete Tasks.**
3. Click **Next** and **Finish** to delete the tasks. Note that any task marked **Complete** will not be deleted.

From Other Records

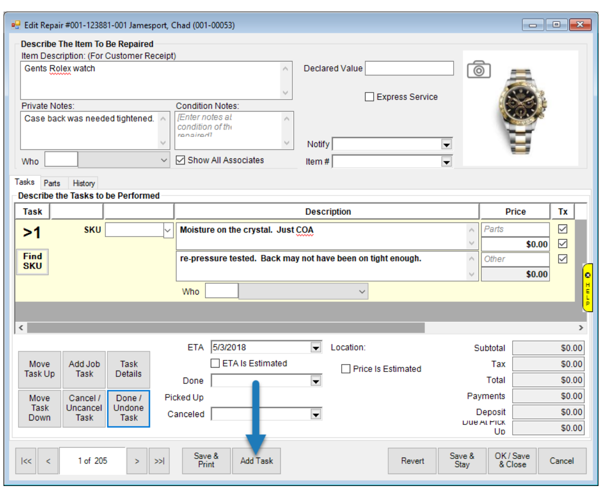
Tasks can be added from customer, item, and service job (repairs, custom jobs, special orders, and appraisals) records. They will retain a link to all related records including any applicable sales receipts. These links will be displayed in the task list view.

Due Date	Priority	Associate	Status	Subject	Category	Links	Completion Date
9/25/2019	Medium	Nancy Gem	Not Started	Appraise ring	Service	C A S	
9/25/2019	High	Sally Repair	Not Started	Repair clasp	Service	C R S	
9/25/2019	High	Anyone	Not Started	item needs cleaning	Inventory	I	

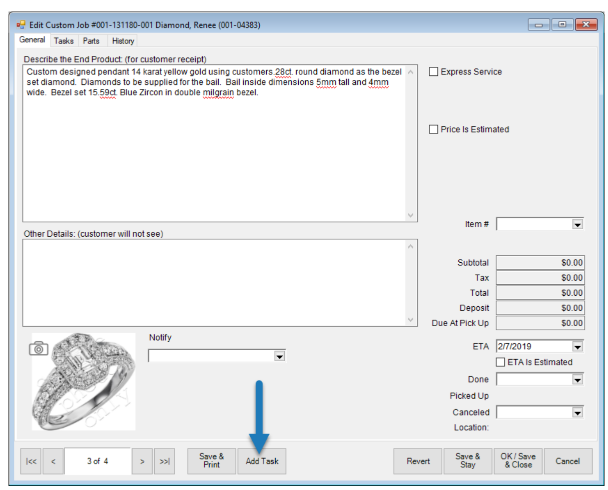
On the task record, the links will appear as icons in the top right. Clicking on the icon will bring up the corresponding record.



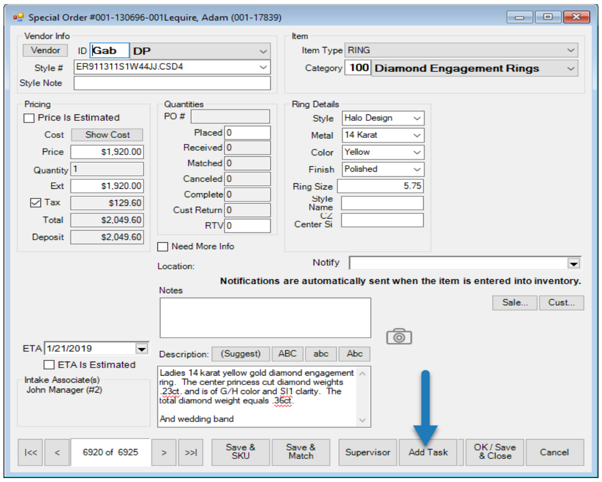
Each record type now has an **Add Task** button at the bottom.



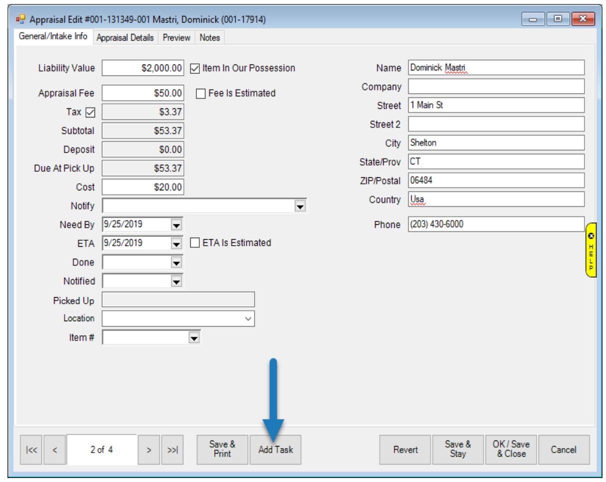
Repair



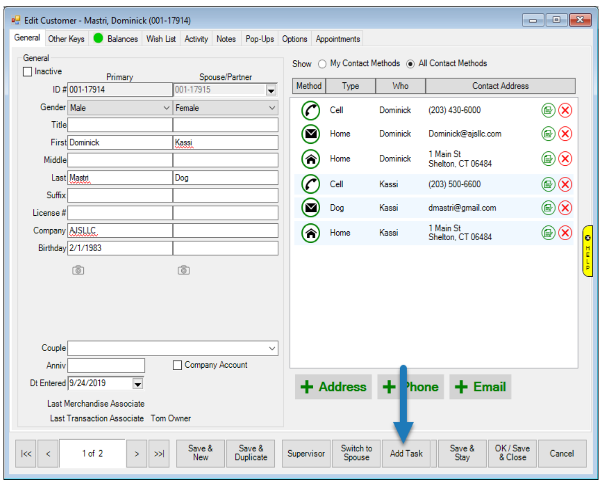
Custom Job



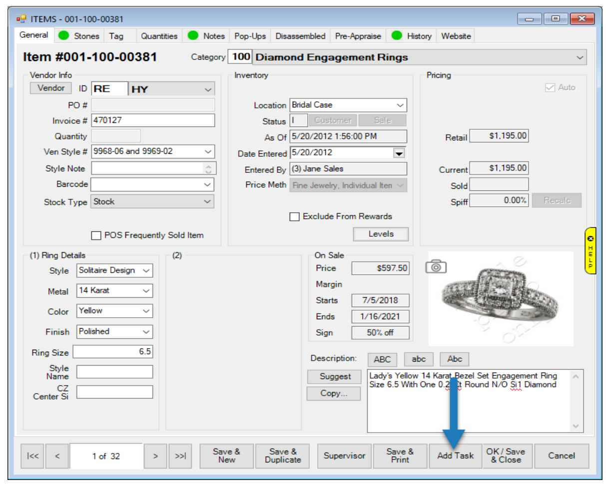
Special Order



Appraisal



Customer



Item

Task Automation Rules

Define rules that will automatically create tasks when trigger conditions are met.

For instance, you can create a rule that generates a thank you follow up task each time an item is sold. Or, a rule that prompts the associate to follow up with the customer when their repair is ready for pick up. There are many more trigger conditions available.

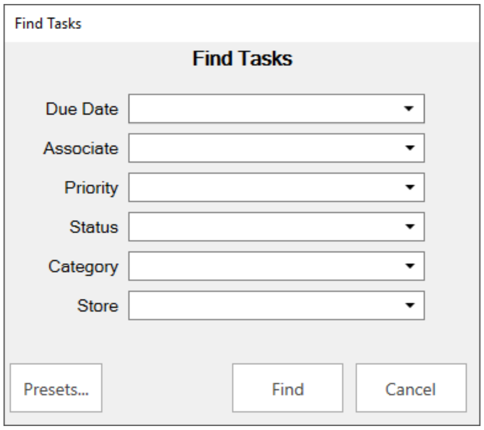
For details: Task Automation Rules

Working with Tasks

Find / Edit

Find Tasks allows you to look up, edit, and complete tasks. To use it:

1. Click **Associate > Tasks > Find**. The **Find Tasks** window will appear.



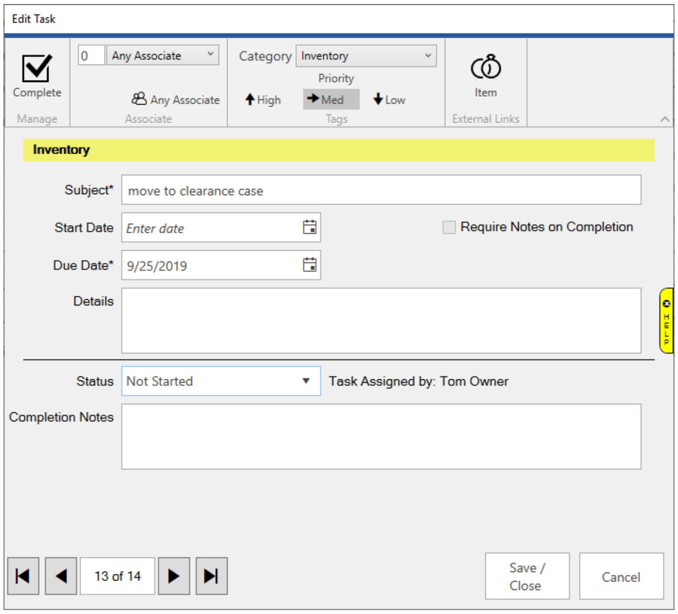
2. You can filter by the following criteria:

Due Date	Date the task is set to be due.
Associate	Associate the task is assigned to. You can select multiple.
Priority	The priority level of the task.
Status	The current status of the task.
Category	The category or type of task.
Store	The store the task was created in.

3. Enter desired criteria and click **Find**. A list of matching tasks will appear.

Due Date	Associate	Status	Subject	Priority	Category	Links	Completion Date	Created By
9/25/2019	Anyone	Not Started	Count case 5	Medium	Inventory			Tom Owner
9/25/2019	Jane Sales	Not Started	Follow up with gift ideas	Medium	Customer	C		Tom Owner
9/25/2019	Nancy Gem	Not Started	Appraise ring	Medium	Service	C A S		Tom Owner
9/25/2019	Anyone	Not Started	Count case 1	Medium	Inventory			Tom Owner
9/25/2019	Anyone	Not Started	Count case 2	Medium	Inventory			Tom Owner
9/25/2019	Anyone	Not Started	Count case 3	Medium	Inventory			Tom Owner
9/25/2019	Anyone	Not Started	Count case 4	Medium	Inventory			Tom Owner
9/25/2019	Sally Repair	Not Started	Repair clasp	High	Service	C R S		Tom Owner
9/25/2019	Sally Repair	Not Started	Call with custom job estimate for approval	High	Service	C C S		Tom Owner
9/25/2019	Anyone	In Progress	Special Order - call customer with price	High	Service	C O S		Tom Owner
9/25/2019	Anyone	Not Started	item needs cleaning	High	Inventory	I		Tom Owner
9/25/2019	Anyone	Not Started	move to clearance case	Medium	Inventory	I		Tom Owner
9/25/2019	Anyone	Not Started	move to clearance case	Medium	Inventory	I		Tom Owner
9/25/2019	Anyone	Not Started	advise customer wish list item on sale	Medium	Customer	C		Tom Owner

4. To edit a task, double click it or select it in the list and click the **Edit** button.



5. To complete a task, click the **Complete** icon in the top left or set the **Status** drop-down to **Complete**.
6. Make any desired changes, then click the **Save / Close** button.

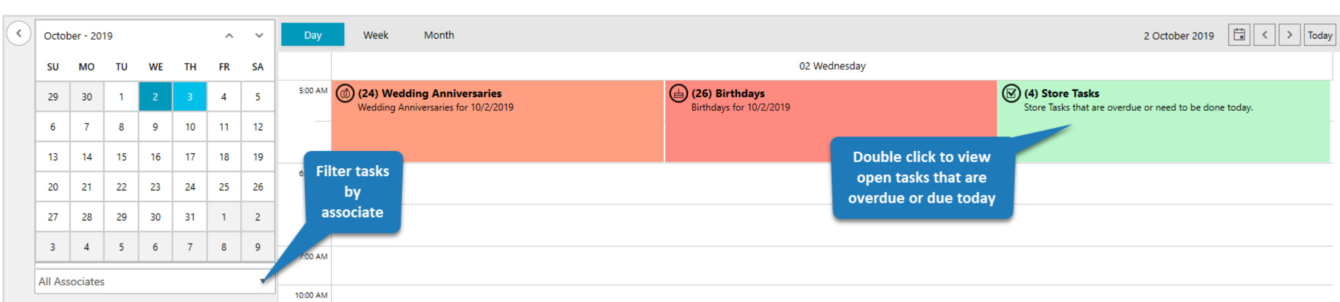
My Open Tasks

My Open Tasks displays all open tasks currently assigned to you. It can be used to look up, complete, and edit tasks. To use it:

1. Click **Associate > Tasks > My Open Tasks**.
2. The login window will appear. Enter your associate credentials.
3. A list of open tasks for this associate will appear. Note that only tasks assigned specifically to the associate appear here. Tasks assigned to **Anyone** will not appear.
4. To edit a task, double click it or select it in the list and click the **Edit** button.
5. To complete a task, click the **Complete** icon in the top left or set the **Status** drop-down to **Complete**.
6. Make any desired changes, then click the **Save / Close** button.

Calendar

The **Store Calendar** has a tile for **Store Tasks**. This tile allows you to view and work with tasks.

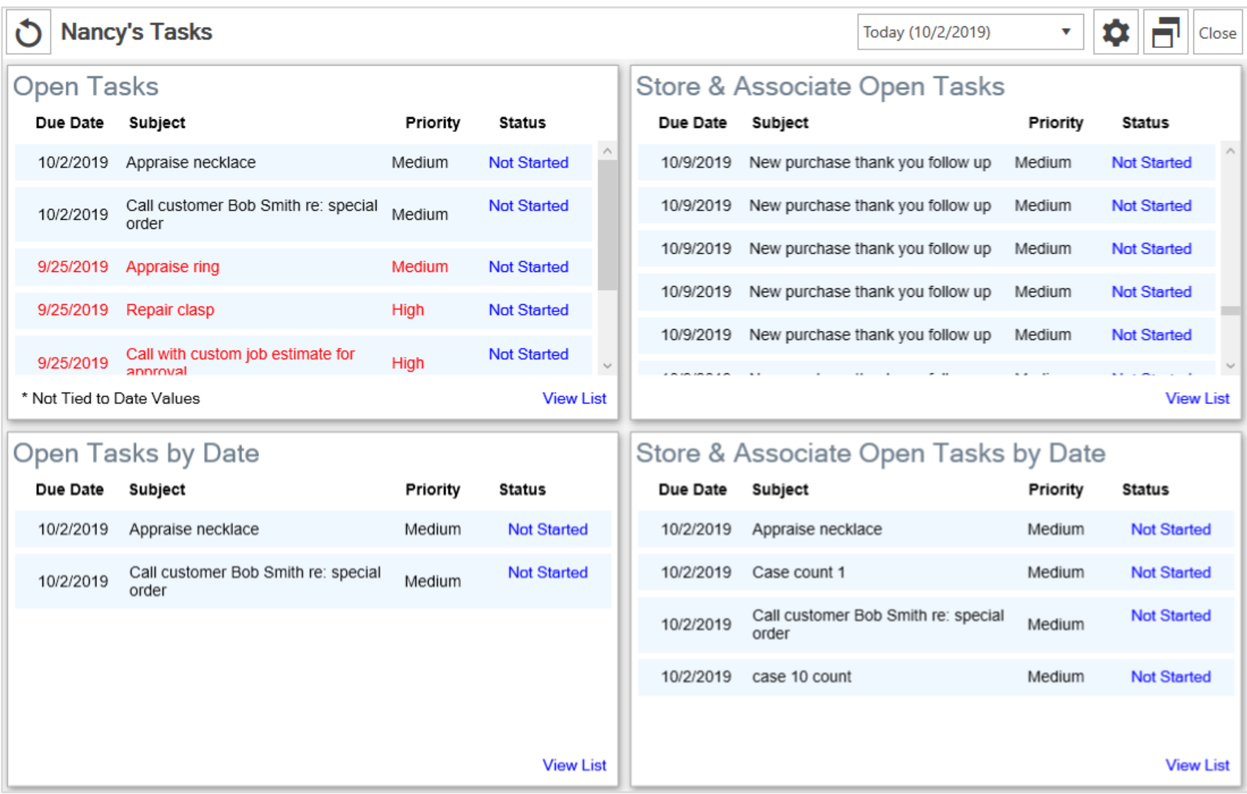


For details: [Store Calendar]

Dashboards

The **Dashboards** feature includes list view tiles that can display task information. There are currently four available.

Open Tasks	All open tasks for selected associate(s) that are open.
Store and Associate Open Tasks	All open tasks for selected associate(s) as well as tasks assigned to 'Anyone' that are open.
Open Tasks by Date	All open tasks for selected associate(s) that are open filtered by dashboard date range.
Store and Associate Open Tasks by Date	All open tasks for selected associate(s) as well as tasks assigned to 'Anyone' that are open filtered by dashboard date range.



For details: Dashboards