Tasks

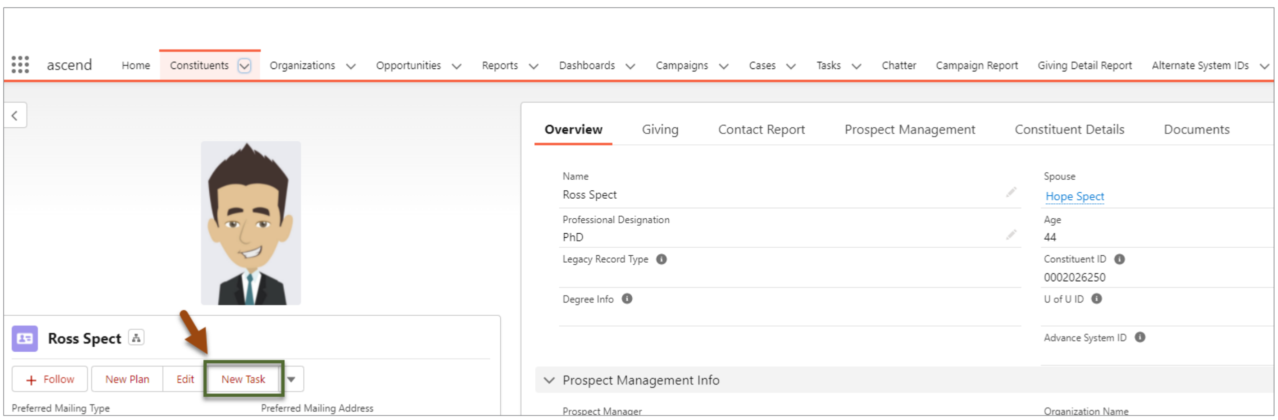
Creating and Managing Tasks

Tasks in Unite can be used to track "To-Do" items to be completed within the next 12 months. Tasks can be related to other records in Unite, such as a constituent, an organization, or a plan. Tasks can also be assigned to other Unite users.

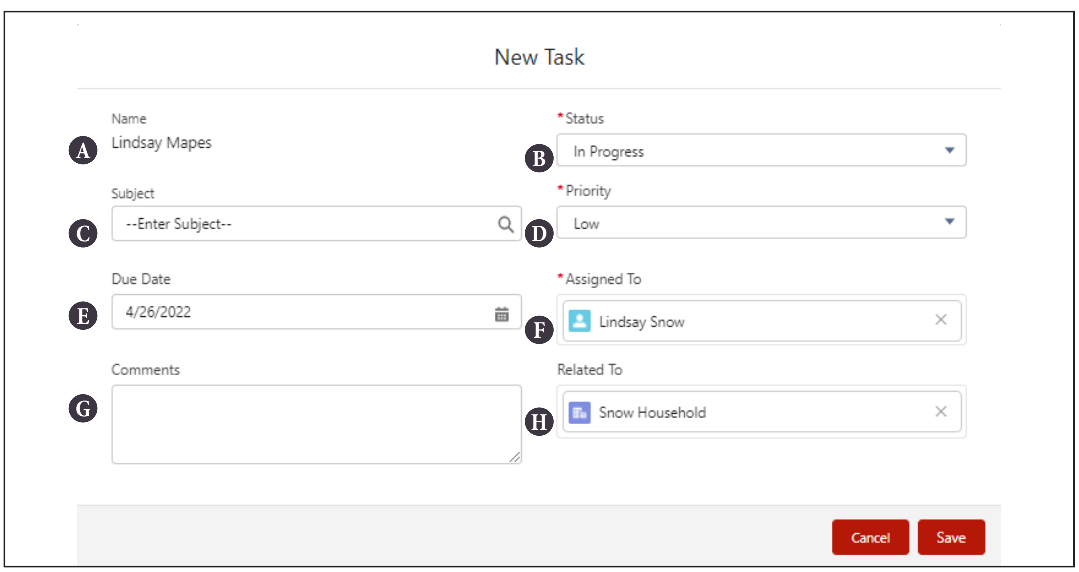
Create New Task

From a Constituent

1 From the constituent's record, click the "New Task" button.



2 Complete the "New Task" form. See next page for information about each field.


New Task

A Name: Lindsay Mapes

B *Status: In Progress

C Subject: --Enter Subject--

D *Priority: Low

E Due Date: 4/26/2022

F *Assigned To: Lindsay Snow

G Comments:

H Related To: Snow Household

Cancel | Save

Unite Tasks

A **Name:** This field will automatically populate with the constituent's name.

B **Status:** Indicate the status of the task (e.g. Not Started, In Progress, etc.). The default status is "Not Started". *This is a required field

C **Subject:** Enter the subject/description of the task.

D **Priority:** Indicate the priority of the task (Low, Normal, or High). The default priority is "Normal". *This is a required field

E **Due Date:** Set a due date for completing the task by clicking the calendar icon and selecting the date.

F **Assigned To:** This field will populate with the person creating the task. To assign the task to another user, click the "X" next to the field and select the appropriate person. *This is a required field

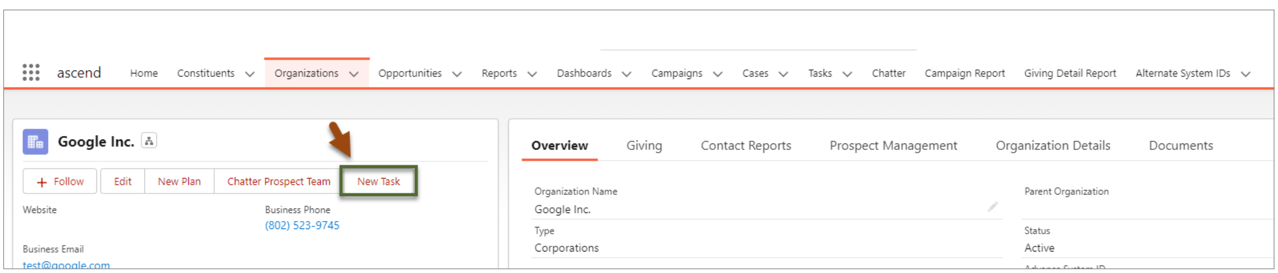
G **Comments:** Enter any notes relevant to the task.

H **Related To:** This field will automatically populate with the constituent's household (i.e. Org Name).

3 Click the "Save" button.

From an Organization

1 From the organization's record, click the "New Task" button.



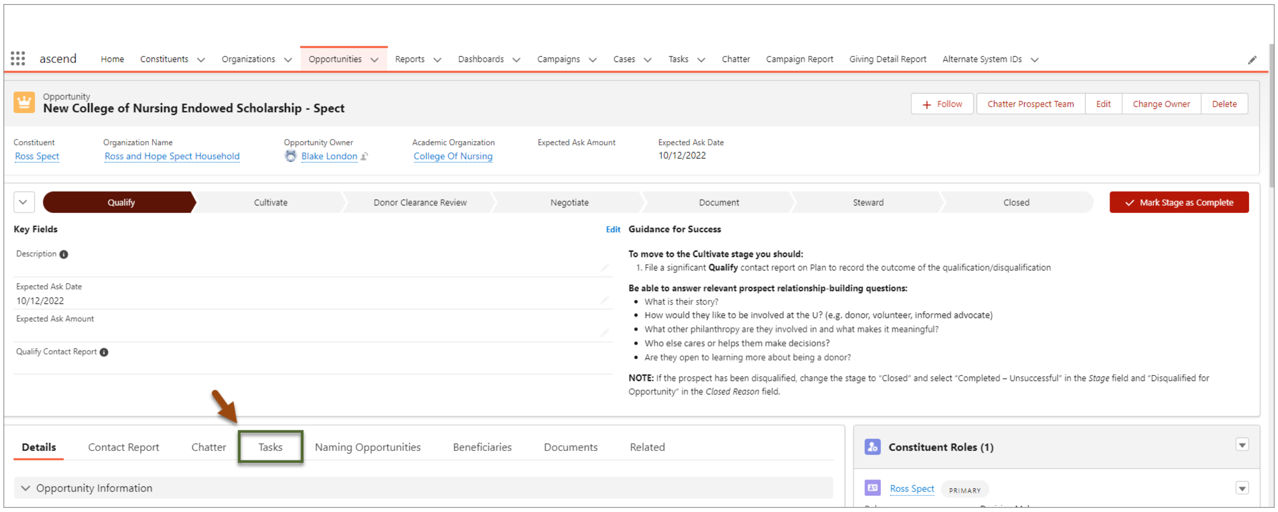
2 Complete the "New Task" form. **NOTE:** The ***Related To*** field will populate with the organization name.

3 Click the "Save" button.

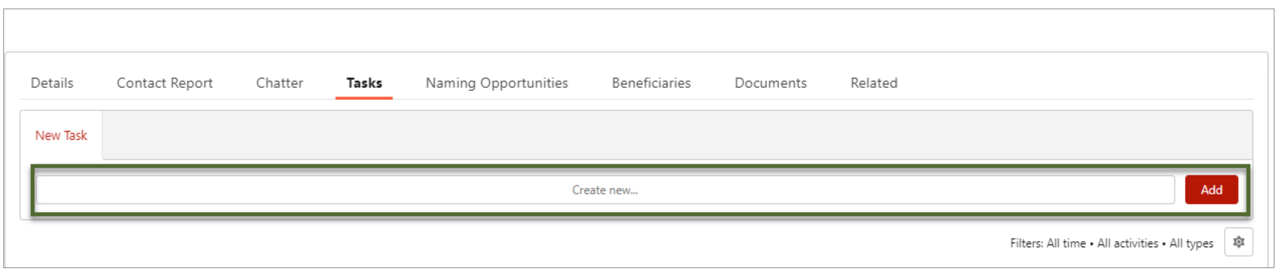
Unite Tasks

From a Plan

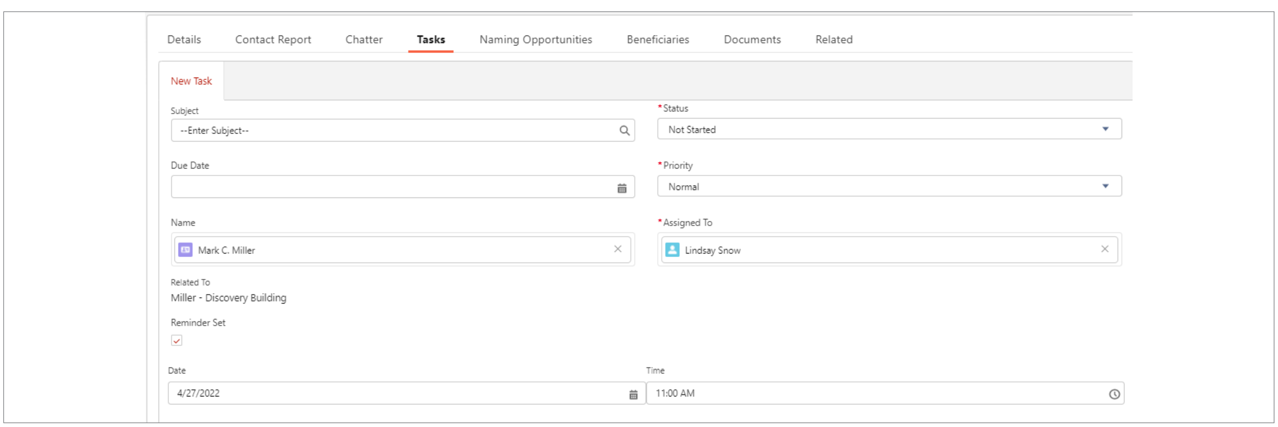
1 From the plan record, click the *Task* tab.



2 Click either "Create New" box or "Add" button.



3 Complete the "New Task" fields. **NOTE:** The ***Name*** field will populate with the constituent and the ***Related To*** field will populate with the plan name.



4 Click the "Save" button.

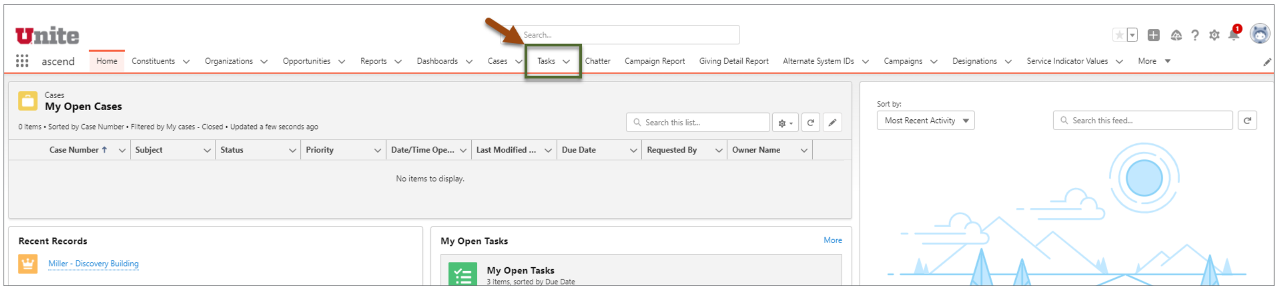
Unite Tasks

View Open Tasks

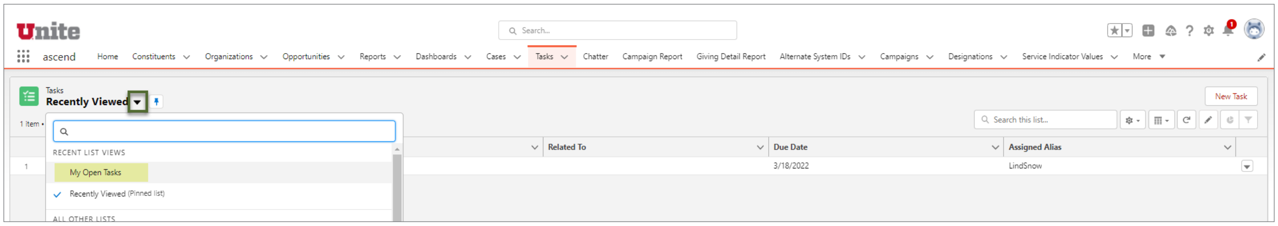
A list of open tasks can be accessed from the Home screen or the "My Open Tasks" list view.

View My Open Tasks List View

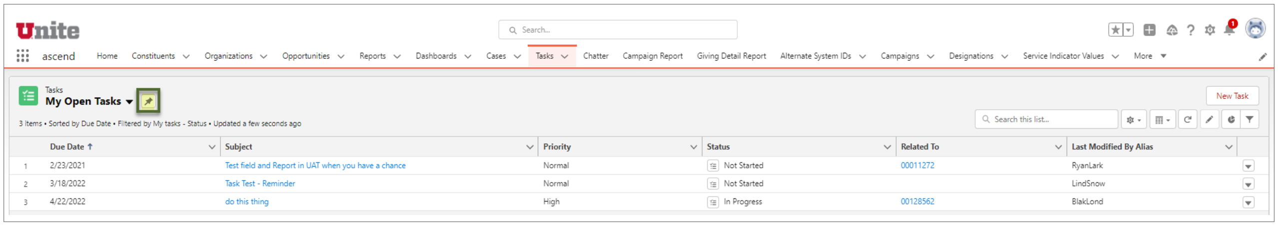
1 Click the "Task" tab on the top navigation bar.



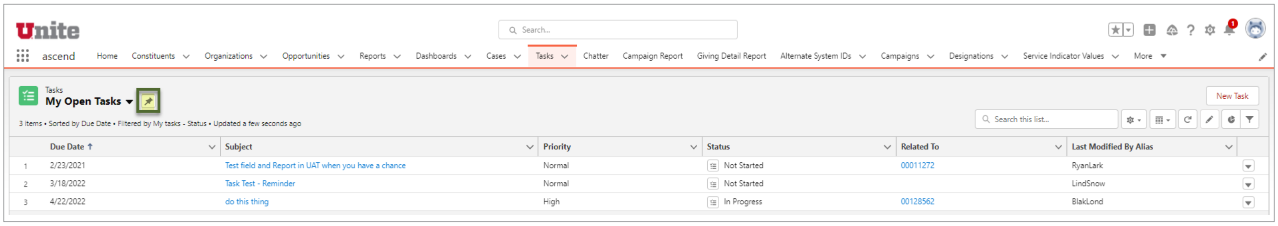
2 Select "My Open Tasks" from the list view drop down.



3 Click the icon to set "My Open Tasks" as the default.



4 Click the subject field of the task to open the task.



Quick Tip

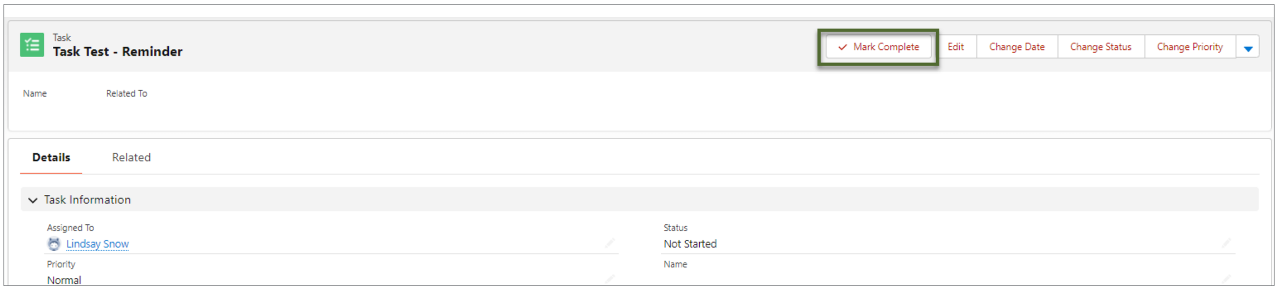
The status of the task can be changed to "Completed" from the list view by clicking the button next to the status field.

Unite

Manage Task

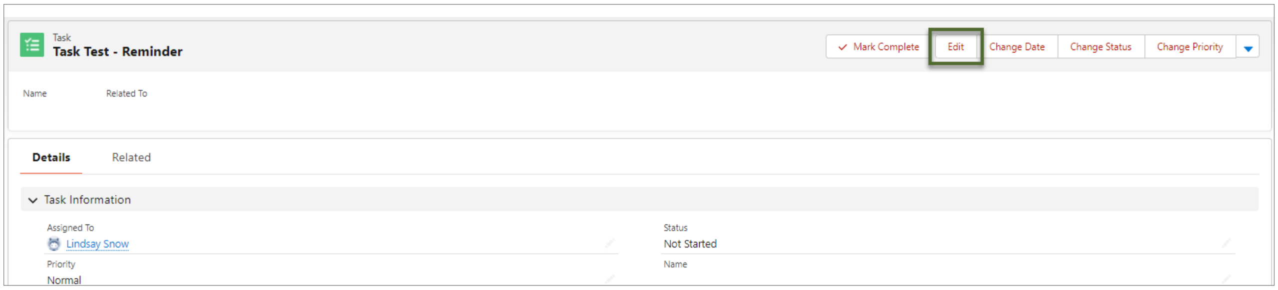
Complete a Task

1. From the task, click the “Mark Complete” button.



Edit Task Details

1. Click the “Edit” button.



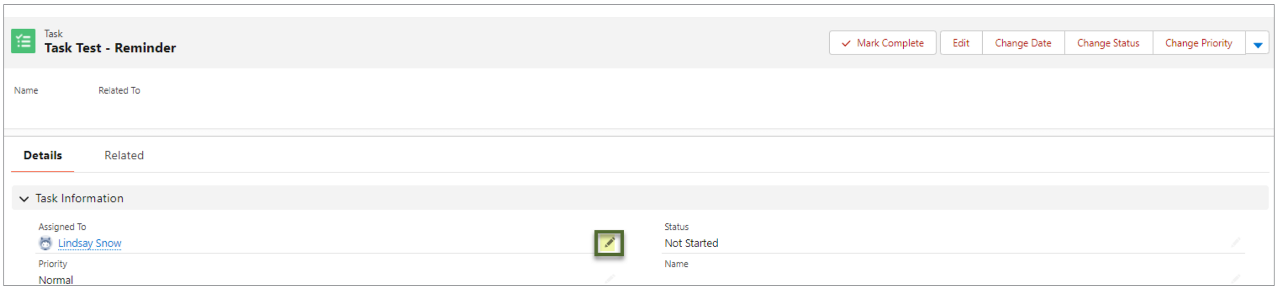
Quick Tip

Task details can also be edited by clicking the pencil icon to the right of any of the editable fields. The date, status, and priority can also be changed using the buttons at the top, “Change Date”, “Change Status”, and “Change Priority”.

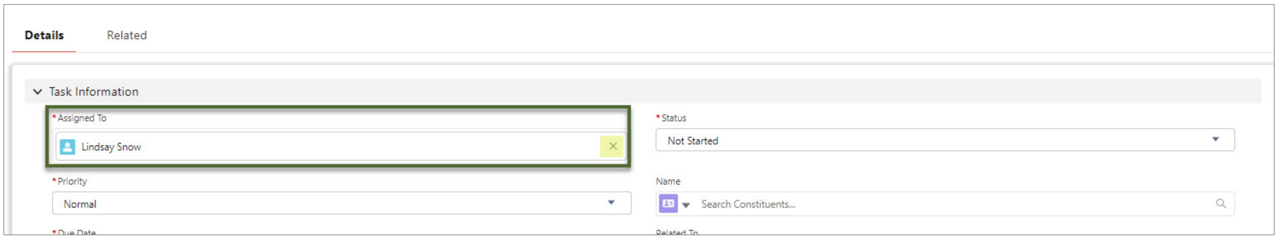
2. Make necessary changes and click the “Save” button.

Assign Task to Another User

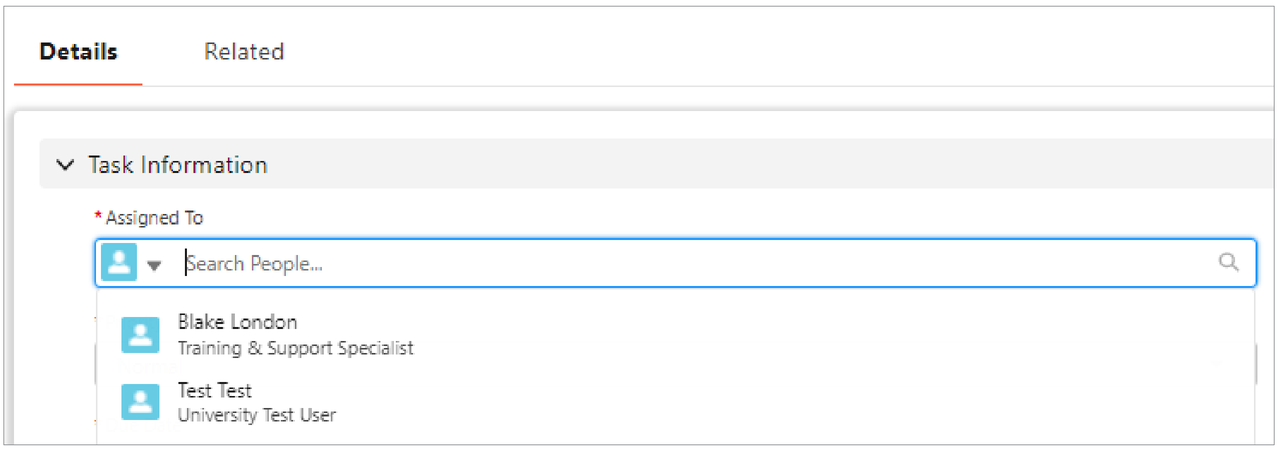
1. From the task, click either the pencil icon next to the ***Assigned To*** field or the “Edit” button.



2. Click the “x” to remove the current user assigned.



3. Search and select the new user.



4. Click the “Save” button.