Chapter 4

Task Management
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The Task Management system can be used to track correspondence, set up tasks with action dates and automatic reminders, record notes on a Client or Policy record and send email confirmation of any of these.

Accessing the Task Management System

Task Management can be accessed either from the Home screen, as shown below,
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Task Manager and Maintenance

The Task Manager and Maintenance screen is displayed below.

Selecting All Tasks from the drop down menu (top right of the screen above), permits you to search for tasks by various criteria in the following screen:

A total calls per day summary is displayed against each User or Client – dependent on the criteria selected in the View By drop down box.

Overdue calls are highlighted in RED

You can click on the “Go to Today” bar at any time to return the calendar to today’s date

Details of the tasks are displayed in this list and clicking on the Task ID allows you to open any task and view the full details

Allocate Tasks to other users by selecting the user to be allocated to from the drop down menu here, and then clicking on the shaded Alloc Task column next to each task you want to allocate to this person.
Entering a New Task

From the **Task Manager and Maintenance** screen click on **New** to create a new Task.

The **Task screen** below will be displayed:

- **Enter the details of the correspondence, conversation or notes to be recorded.**
- **Input the Next Action Date** to have the system send a reminder to you of the **Action Required.**
- **You can click on Select Contacts** to select from a list of existing contacts or add new contacts for future use. (See below for more information)
- **Click on the Client Processing or Policy Processing links** (if a Client Code or Memo Number has been entered) and you are taken into the relevant processing screen and can update the Client and/or policy records if required.
On the Task screen you are offered the option to Send an Email which expands the screen to reveal the following section:

Clicking on New Contact or Update Contact accesses the Contact Maintenance screen where Contact details can be added or altered.

Complete the details and when you click on Submit an email will be sent to the address(es) input.
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Task Versioning

Once a task is entered, it is date and time stamped. You can amend a task at any time, which will create a new version of the task. The version details are shown at the top of the Task screen, as illustrated below:

<table>
<thead>
<tr>
<th>ID</th>
<th>Version 2</th>
<th>Original Task</th>
<th>26/01/07 - 09:43</th>
<th>by: ANDS</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Previous</td>
<td>This Version</td>
<td>25/01/07 - 11:19</td>
<td>by: ANDS</td>
</tr>
</tbody>
</table>

Click on Previous or Next to navigate between the versions of a task.

There is also a summary of the history of a task shown at the bottom of the screen:

<table>
<thead>
<tr>
<th>Year</th>
<th>Original Date</th>
<th>Next Action Date</th>
<th>Reference</th>
<th>Client</th>
<th>Client Insured Name</th>
<th>User Memo</th>
<th>Creditor</th>
<th>Subject</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>22/02/07</td>
<td>22/02/07</td>
<td>P00007</td>
<td>Harry Smith</td>
<td>John Doe</td>
<td>06119027</td>
<td></td>
<td>Would like to reactivate N</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>22/02/07</td>
<td>22/02/07</td>
<td>P00007</td>
<td>Harry Smith</td>
<td>John Doe</td>
<td>06119027</td>
<td></td>
<td>Would like to reactivate V</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>22/02/07</td>
<td>22/02/07</td>
<td>P00007</td>
<td>Harry Smith</td>
<td>John Doe</td>
<td>06119027</td>
<td></td>
<td>Task Allocated to am V</td>
<td></td>
</tr>
</tbody>
</table>

Finalising a Task

Once a task is completed, you can finalise the task. Any task not finalised by the due date, will appear in RED as an overdue task in the Task List.

To finalise the task, you select it from the list and add the Finalised Date into the field as shown here:

Submit to complete the finalisation process.