Creating a Task

Tasks are used to assign and track important activities that need to be performed with a prospect. There are many types of Tasks used in Advance; the most common type used by Development is Prospect Next Steps. After creating a task, Advance sends an Outlook task to the responsible person assigned to perform it. The responsible person can then accept the task into his/her Outlook task list. You can also view and manage tasks from the Tasks shortcut button in Advance.

1. From the Home page tree, under CUF Lookups, click **Entity**.
2. In the **ID Number** box, type the Entity ID and click **Run Report**.
3. Click the link to the Entity record. The Entity Overview page appears.

Take a Shortcut:

1. Click **My Prospects** shortcut.
2. Click the Prospect Name link.

4. From the Entity page tree, click **Tasks/Next Steps**. The Entity Task page appears.
5. From the Tasks form header, click **New**.
6. From the **Task** list, scroll down and click **PNS Prospect Next Steps**.
7. From the **Status** list, click **IP In Progress**.
8. From the **Scheduled** calendar, click the date on which you want the task to be due in Outlook.
9. Optionally, you can select a Priority (High, Low, Normal) which is useful when viewing the Lookup - Tasks Report.
10. In the **Description** field, enter details about the task to be performed. This description appears in the email reminders for this task.
11. From the **Responsible** list, select the person who will perform the task. (See the Note below for more info.)
12. If there is a contact report that you want to associate with the task, select it from the **Contact Rpt** list box.
13. If the task is recurring, select how often the task is to be performed from the **Frequency** list box. If you choose a frequency, indicate the number of days/weeks/months that this task should occur from the scheduled date in the appropriate **Recur** box.
14. From the **Source** list box, select the person who is assigning the task to the Responsible person. If the Source is the same as the Responsible person, leave Source blank.
15. Click **Save** from the form header. The task is displayed by scheduled date in the list of tasks. Advance sends an email to the Responsible person, who can then accept the task into the Outlook Task list.

Note: If you want to assign a task to more than one responsible person, click the Task to highlight it in the Tasks form, then scroll down to the Tasks Responsible form and click New. You can then select an additional staff member from the ID list.

Completing a Task

Once a task has been completed, you must mark it as Completed in Advance (or you will continue to receive past due reminders).

1. From the Advance home page, click the **My Tasks** shortcut button.
2. Select the task by clicking the ellipses button that appears next to the task.
3. From the **Status** list box, select **Completed**.
4. From the **Completed** calendar, select the date on which the task was completed.
5. Click **Save** from the form header.

Viewing Tasks

Click **CUF Lookups> Task** to view your tasks and task assignments.