Creating a Task

This guide will cover:

- The process of creating a task for yourself or another user such as a request for campaign approval.

Step One

To create a new task, select Tasks from the Contacts module.

Step Two

Click on the "New Task" button.

Step Three

Complete the task information section with all appropriate details including:

- Creating a subject name.
- Assigning a task owner (this will default to the user creating the task but can be assigned to another user such as a Campaign email approver).

**Note:** To assign a different task owner, use the icon to search for the user by name.

- Assigning a due date and time.
- Selecting a contact using the icon (if the task is related to a specific prospect or applicant).
- Selecting a type (such as a Campaign or Case) and attaching the associated item using the icon.
- Selecting a status.
- Assigning a priority level.
- Enabling a notification email to be sent to the task owner.
- Selecting an organization name (if necessary).

![Task Information Image]

**Step Four**

Create a description that details the purpose of the task.

![Description Information Image]

**Step Five**

Click **Save**. An email notification will be sent immediately to the task owner notifying them of the newly assigned task.

**Note:** To easily view open tasks, it is recommended to create a widget on the home screen using **Tasks** as the module and **Open Tasks** as the selected list view.

![Add Widget to Workspace Image]