

TASK MANAGEMENT

The slide features a dark blue background. The title 'TASK MANAGEMENT' is centered in the upper half in a white, sans-serif font. Below the title, there are two horizontal blue bars. The first bar is a solid blue rectangle. The second bar is a lighter blue rectangle that starts to the right of the first bar and extends to the right edge of the slide, creating a layered effect.

What we will cover!



Different Task Types



How to configure Task Types



How to create Tasks and complete Task Actions



Using the power of Automation for repetitive Tasks



Smart Views and Reports for better Task Management



Geofencing Tasks on Mobile

Task Types

Appointments	To Dos
<p>Have a definite start and end date and time (23 July 2020 3.p.m to 4 p.m.).</p>	<p>To dos don't have a specific start and end time. You can configure to dos to be completed within a certain date range (tomorrow, this week, this month, etc.) but don't have to define a specific time (2 p.m. to 4 p.m.).</p>
<p>Examples of appointments include meetings, webinars, demos, presentations, etc.</p>	<p>Examples of to dos include follow ups on old leads, cold calls, in-field address verification, and any task that you don't have to specify an exact time for.</p>
<p>Show up on both the classic list and calendar views on the Manage Tasks and Smart Views pages.</p>	<p>Shows up on the classic list view and on the right pane in the calendar view.</p>



How to Configure Task Types

- Prerequisite

You must be an Admin user to create and customize task types

- To create and edit Appointments, navigate to

[Accounts](#) → [Settings](#) → [Leads](#) → [Configure Task Types](#) → [Appointments](#)

- To create and edit To Dos, navigate to

[Accounts](#) → [Settings](#) → [Leads](#) → [Configure Task Types](#) → [To Dos](#)

- Please refer following Web Article for detailed steps on how to configure tasks types

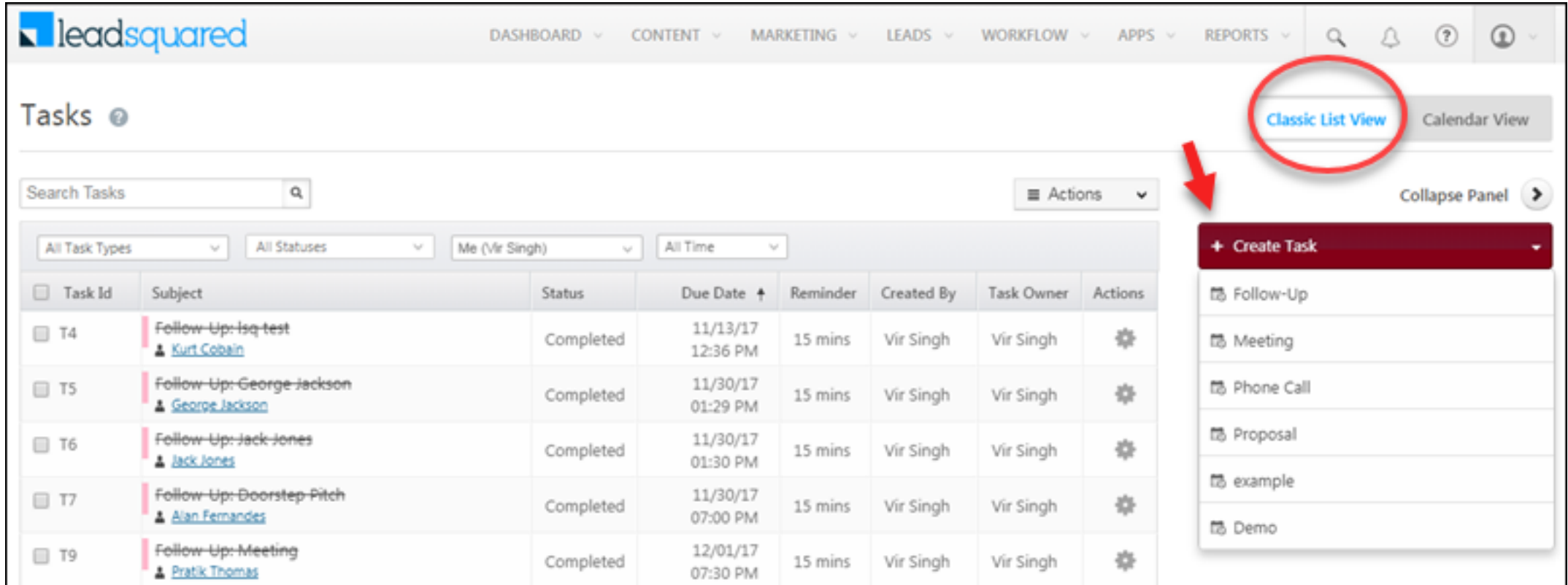
<https://help.leadsquared.com/tasktype/>



How to create Tasks

Creating Task from Manage Task Page

Navigate to [Leads>Manage Tasks](#). To create a task from the classic list view, click the **Create Task** button.



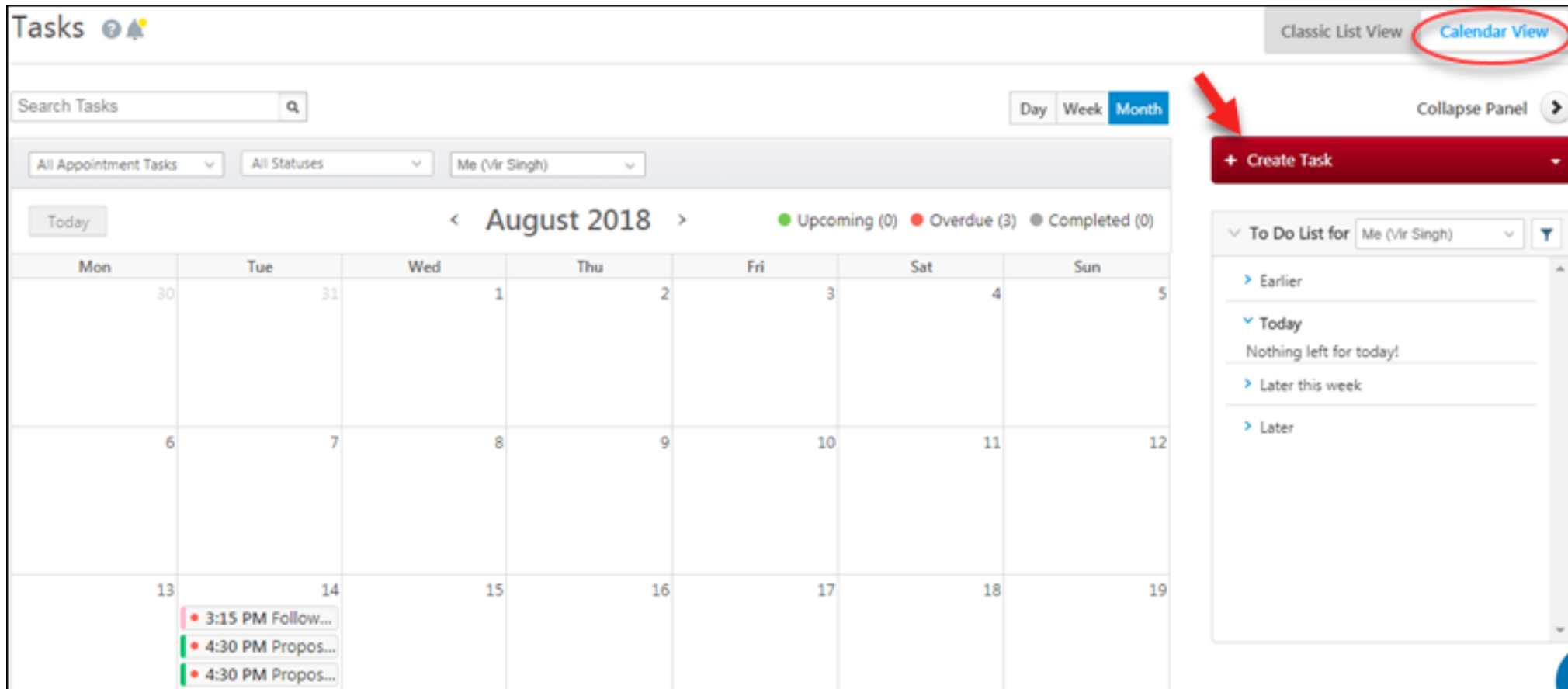
The screenshot displays the LeadsSquared interface for the 'Tasks' page. The top navigation bar includes 'leadsquared' and various menu items like 'DASHBOARD', 'CONTENT', 'MARKETING', 'LEADS', 'WORKFLOW', 'APPS', and 'REPORTS'. The main header shows 'Tasks' with a help icon. Below this is a search bar and an 'Actions' dropdown. The main content area features a table of tasks with columns for Task Id, Subject, Status, Due Date, Reminder, Created By, Task Owner, and Actions. A red circle highlights the 'Classic List View' button in the top right, with a red arrow pointing to the 'Create Task' dropdown menu that is open, showing options like 'Follow-Up', 'Meeting', 'Phone Call', 'Proposal', 'example', and 'Demo'.

Task Id	Subject	Status	Due Date	Reminder	Created By	Task Owner	Actions
T4	Follow-Up: Isq-test ▲ Kurt Cobain	Completed	11/13/17 12:36 PM	15 mins	Vir Singh	Vir Singh	⚙️
T5	Follow-Up: George Jackson ▲ George Jackson	Completed	11/30/17 01:29 PM	15 mins	Vir Singh	Vir Singh	⚙️
T6	Follow-Up: Jack Jones ▲ Jack Jones	Completed	11/30/17 01:30 PM	15 mins	Vir Singh	Vir Singh	⚙️
T7	Follow-Up: Doorstep-Pitch ▲ Alan Fernandes	Completed	11/30/17 07:00 PM	15 mins	Vir Singh	Vir Singh	⚙️
T9	Follow-Up: Meeting ▲ Pratik Thomas	Completed	12/01/17 07:30 PM	15 mins	Vir Singh	Vir Singh	⚙️

Refer [Help Article](#) for details on scheduling Tasks

Creating Task from Manage Task Page

Navigate to [Leads>Manage Tasks](#). If you're on the calendar view, you can click the **Create Task** button or even double-click on a date slot to create a task for that date (month view)

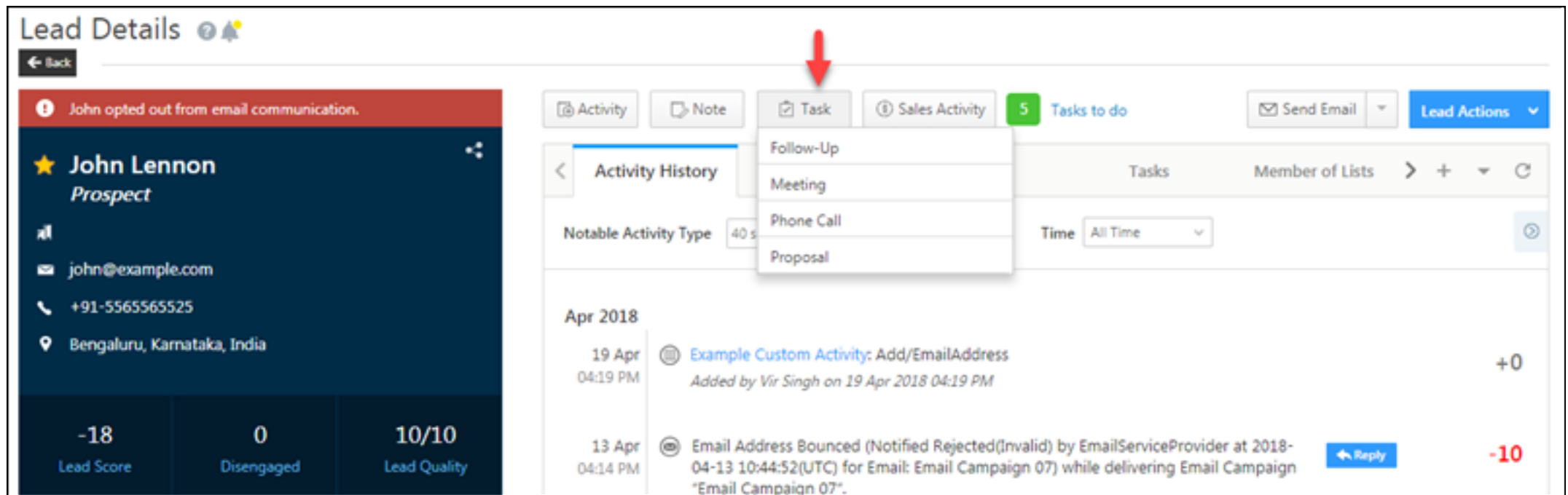


The screenshot displays the 'Tasks' management interface. At the top right, the 'Calendar View' button is circled in red. Below it, a search bar and view toggles (Day, Week, Month) are visible. The main area shows a calendar for August 2018. On the right side, a red '+ Create Task' button is highlighted with a red arrow. Below this button is a 'To Do List for Me (Vir Singh)' panel with expandable sections for 'Earlier', 'Today' (containing 'Nothing left for today!'), 'Later this week', and 'Later'. The calendar grid shows dates from 30th to 19th, with a task list for August 14th including '3:15 PM Follow...', '4:30 PM Propos...', and '4:30 PM Propos...'.

Refer [Help Article](#) for details on scheduling Tasks

Creating Task from Lead Details Page

You can create tasks from Lead details page.
Click Task Tab → Select Tasks You want to create



The screenshot displays the 'Lead Details' page for a prospect named John Lennon. The page is divided into several sections:

- Lead Information:** John Lennon, Prospect, john@example.com, +91-5565565525, Bengaluru, Karnataka, India.
- Lead Metrics:** Lead Score: -18, Disengaged: 0, Lead Quality: 10/10.
- Activity History:** A list of activities with columns for date, time, activity type, and score. A red arrow points to the 'Task' tab in the activity menu, which is open, showing options: Follow-Up, Meeting, Phone Call, and Proposal.
- Activity List:**
 - 19 Apr 04:19 PM: Example Custom Activity: Add/EmailAddress (Added by Vir Singh on 19 Apr 2018 04:19 PM) with a score of +0.
 - 13 Apr 04:14 PM: Email Address Bounced (Notified Rejected(Invalid) by EmailServiceProvider at 2018-04-13 10:44:52(UTC) for Email: Email Campaign 07) while delivering Email Campaign "Email Campaign 07". (Reply button) with a score of -10.

Refer [Help Article](#) for details on scheduling Tasks

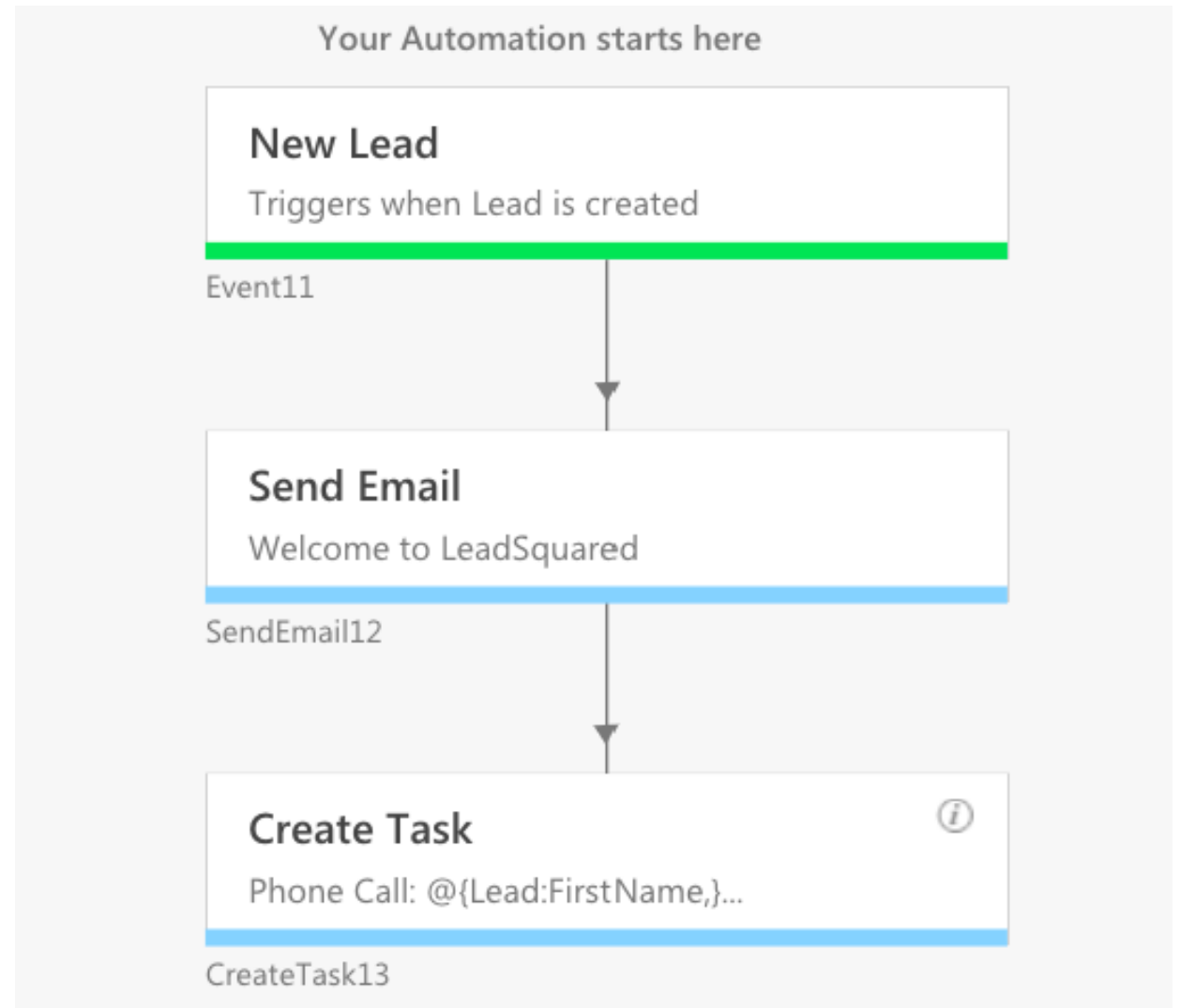


Automations for repetitive Tasks

Few Examples

Use Case 1

For new leads an Auto Task of 1st Call needs to be created for lead owner so as to achieve TAT of 30 mins.

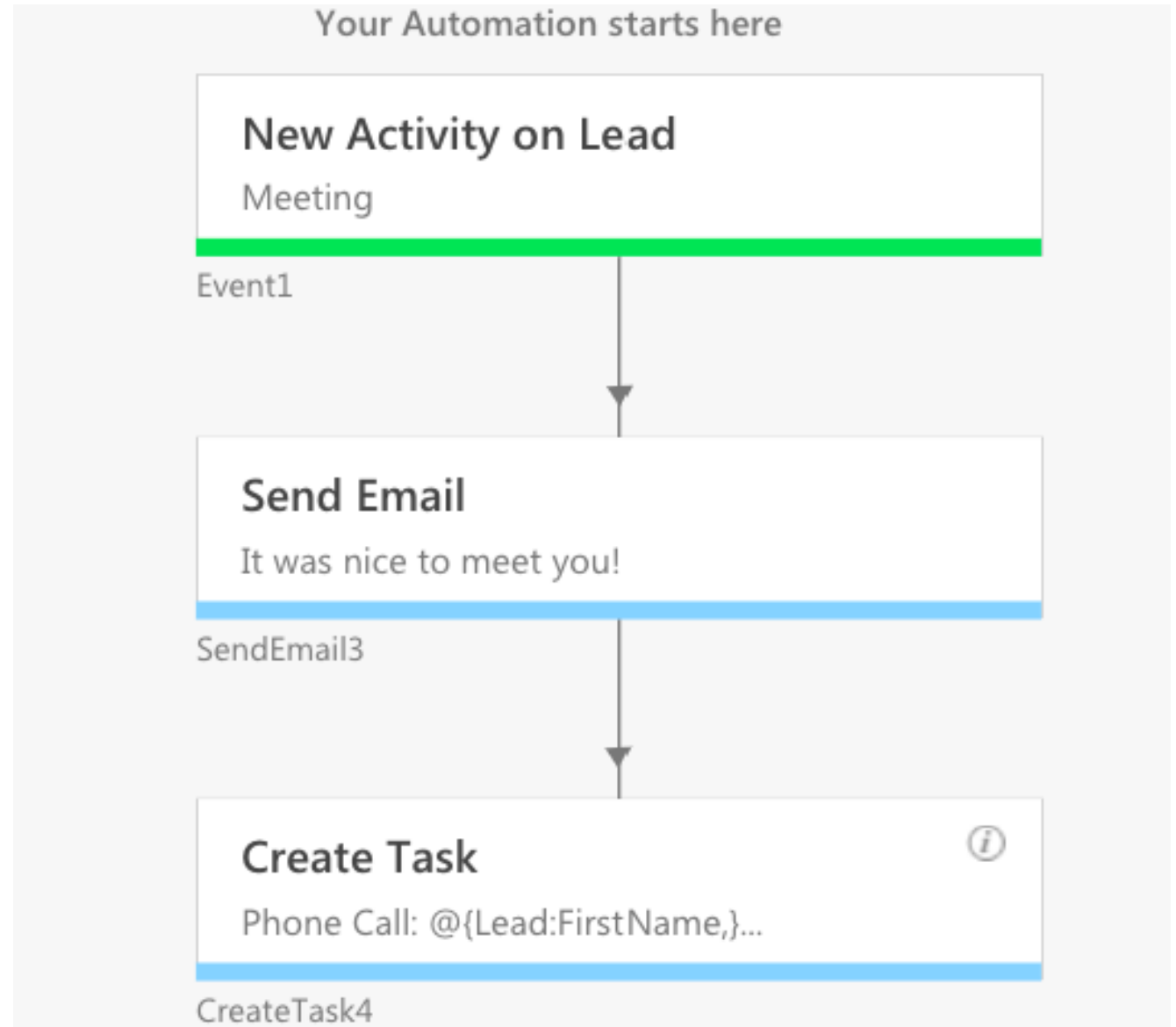


Use Case 2

Auto Task creation based on specific date entered in any activity.

Example:

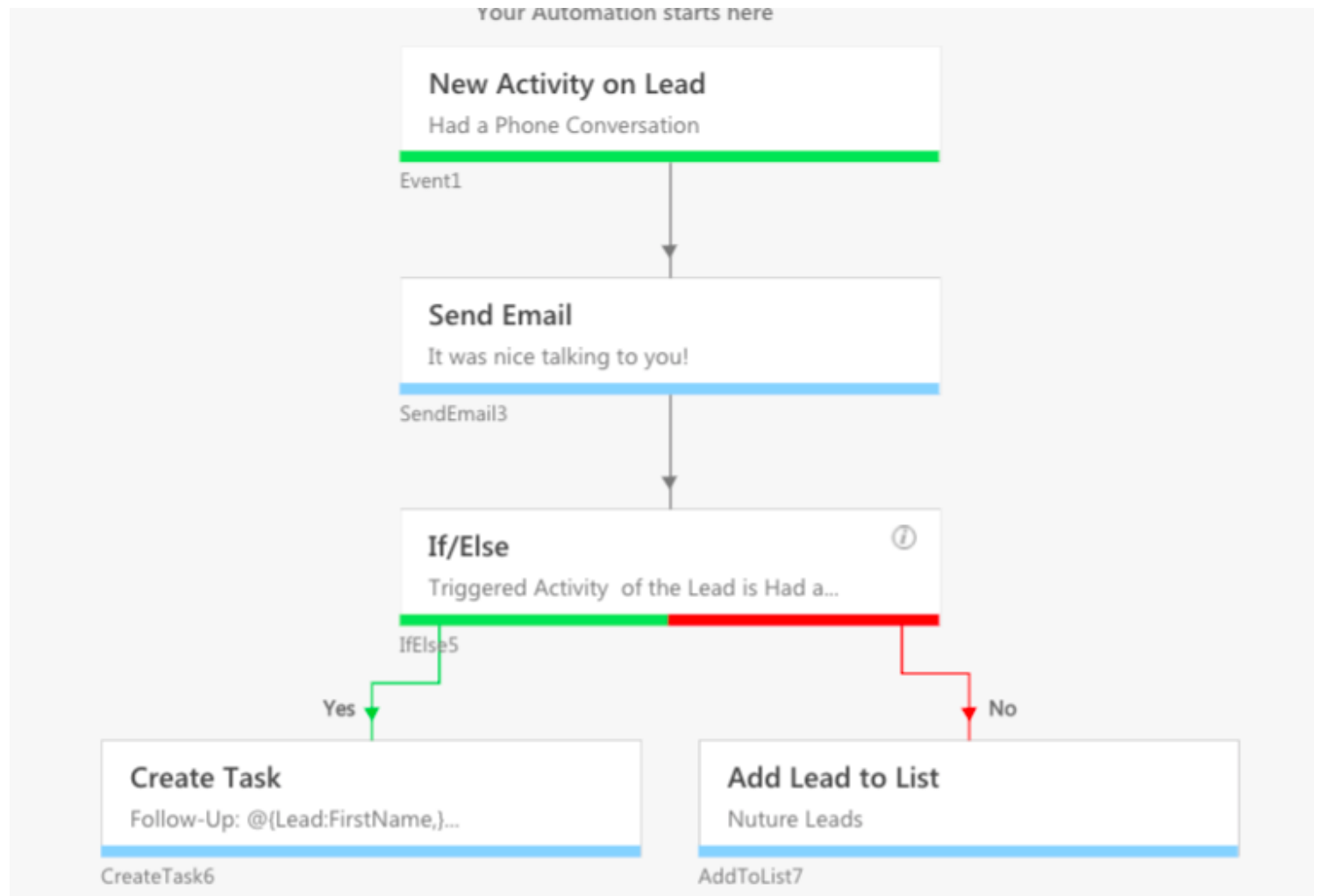
Next Follow-up Call. Lead has asked to call back on specific date and time.



Usecase 2 (Alternate Version)

Lead haven't mentioned specific date and time for Follow-up Call.

As per Company's SOP User needs to call Lead in next 4 days.



Usecase 3

Scheduling Tasks for other teams

Example

Scheduling 'Site Visit' for Leads and same to be done by Sales Team of Company.

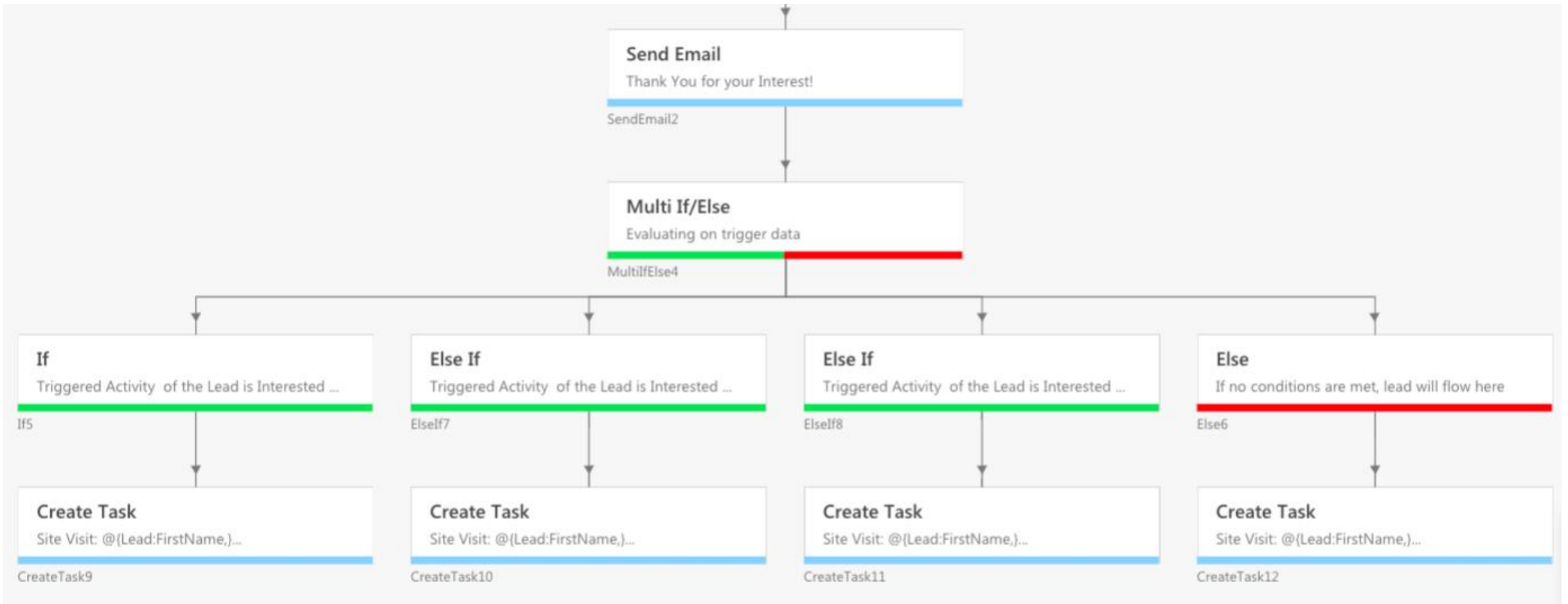
OR

Scheduling 'Counselling Session' for Lead and same to be done by Counselling Team.

OR

Scheduling 'Document Collection' from Lead and same to be done by On-Field Team.



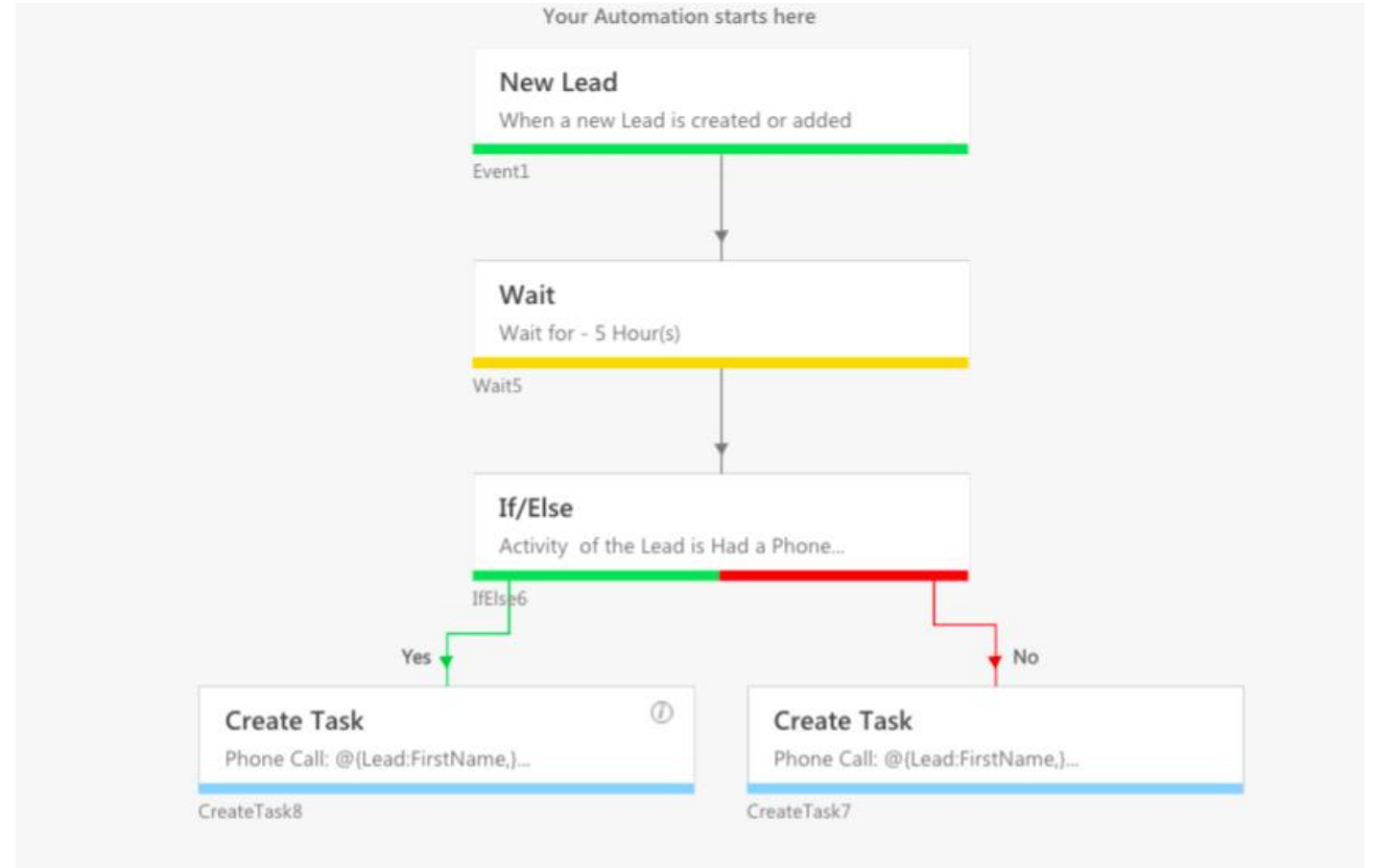


UseCase 3 : Sample Automation

UseCase 4:




Escalation Tasks to Managers

Example: If new lead is not attended within specific time, a task will be created for Manager to attend the Lead



Task as Automation Trigger Point

When will your Automation start? ×

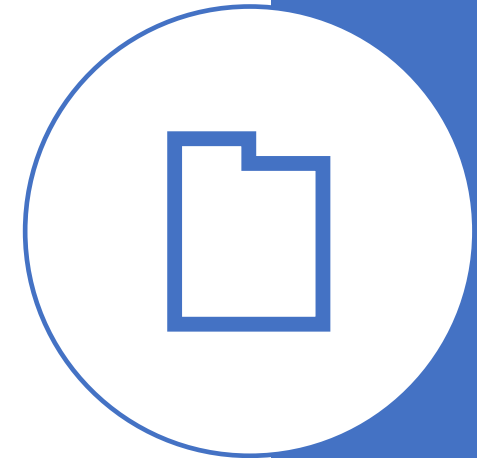
Lead Trigger	 Task Created on Lead When a new task is created or added on Lead
Activity Trigger	
User Trigger	 Task Reminder for Lead On task reminder
Task Trigger	 Task Completed on Lead When a task is completed on Lead



Smart Views and Reports

Steps to setup Smart Views – Task Tab

1. [Goto Leads→Smart Views](#)
2. Click the downward arrow icon alongside the default tabs to open the **List All Tabs** menu.
3. In the menu, click the **Add New Tab**.
4. In the **Add New Tab** pop-up enter –
 - a) Select Type Tasks.
 - b) Name – Enter a name for the tab and select a colour.
 - c) Description – Enter a description
 - d) Select Task Type and Task Status
5. Click **Add** and then click the **Set Criteria** button.
6. Click **Save**.





Standard Task Analysis Reports

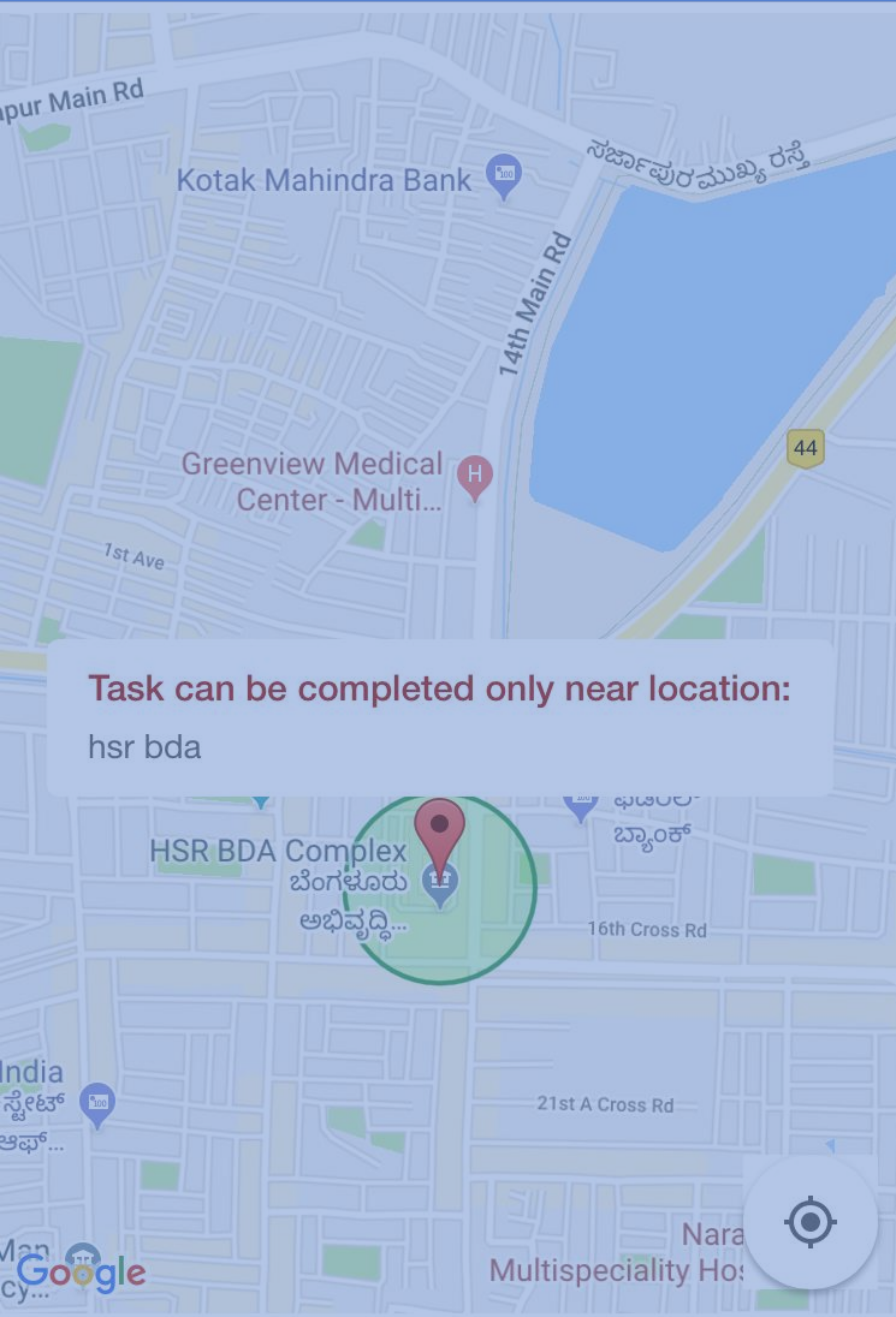
1. [Completed Tasks Report](#)
2. [Leads with no Tasks](#)
3. [Leads with pending Tasks](#)
4. [Sales Group-wise Pending Tasks Report](#)
5. [Sales Group-wise User Task Summary](#)
6. [Task List analysis](#)
7. [Task Summary Report](#)



An aerial photograph of a city street grid, showing a mix of residential buildings, commercial structures, and green spaces. The text "GEOFENCED TASKS" is overlaid in the center in a large, white, sans-serif font. The image has a blueish tint, suggesting a dusk or dawn setting. The text is centered horizontally and vertically, spanning across several city blocks.

GEOFENCED TASKS

✕ Cannot complete task!



GEOFENCED TASKS



WHAT ARE GEOFENCED TASKS

Tasks that can be marked complete only from within a predefined location with a set area radius, is known as a geofenced task.



HOW DOES IT WORK

- While creating a task, the user/admin will enter the location at which the task is to be executed
- Before marking the task complete, the users location is fetched
- If the user is within the geofence, the task will be marked complete
- If the user is not within the geofence, the task will not be marked complete until he is within the geofence

Thank You
