# TASK MANAGEMENT

# 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 |
|---|---|
| Have a definite start and end date and time (23 July 2020 3.p.m to 4 p.m.). | To dos don’t have a specific start and end time.<br>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.). |
| Examples of appointments include meetings, webinars, demos, presentations, etc. | 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. |
| Show up on both the classic list and calendar views on the Manage Tasks and Smart Views pages. | Shows up on the classic list view and on the right pane in the calendar view. |

# 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

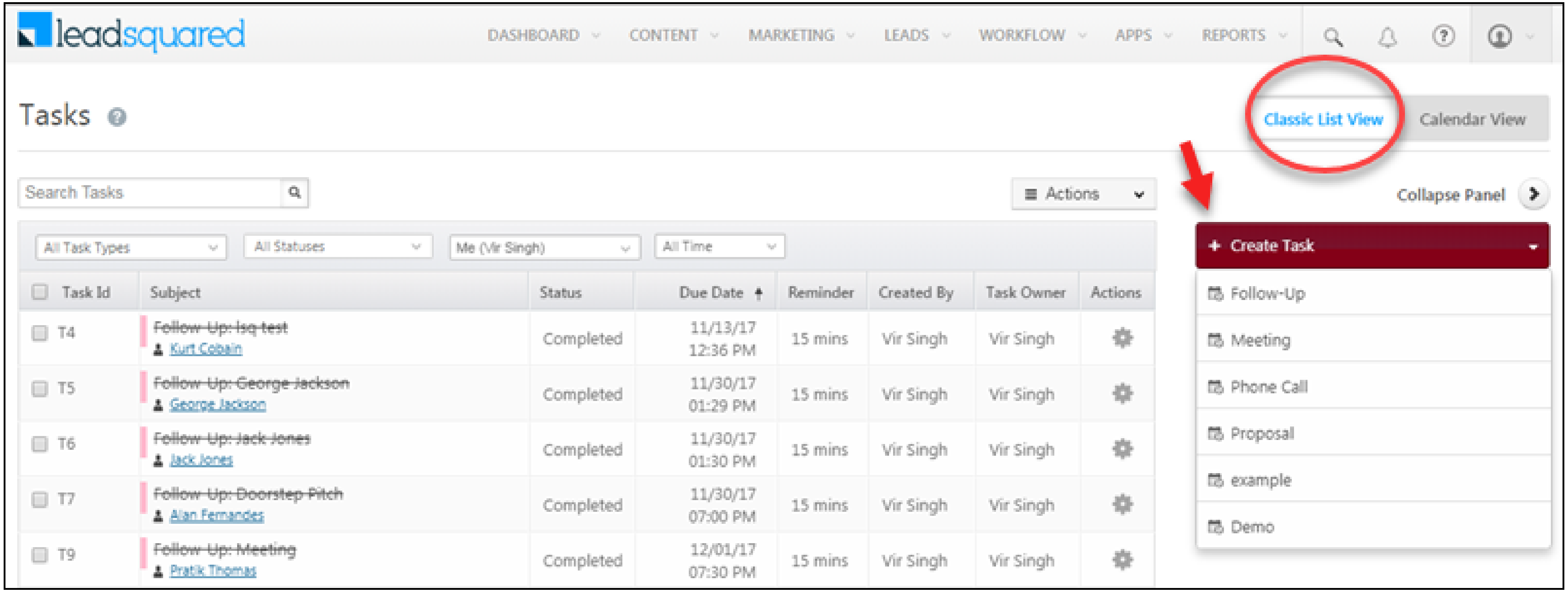
- Please refer following Web Article for detailed steps on how to configure tasks types

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

# How to create Tasks

# Creating Task from Manage Task Page

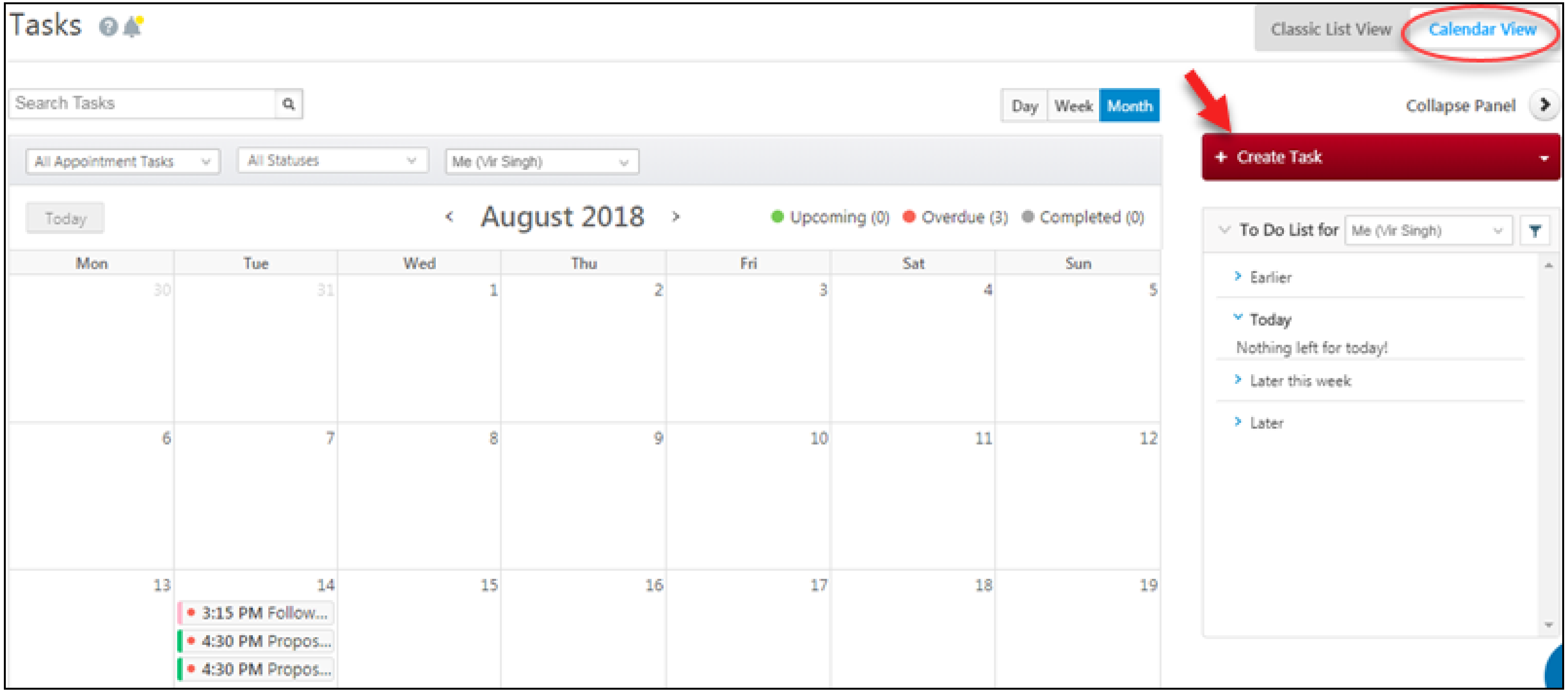
Navigate to Leads>Manage Tasks. To create a task from the classic list view, click the **Create Task** button.




Refer Help Article for details on scheduling Tasks

# Creating Task from Manage Task Page

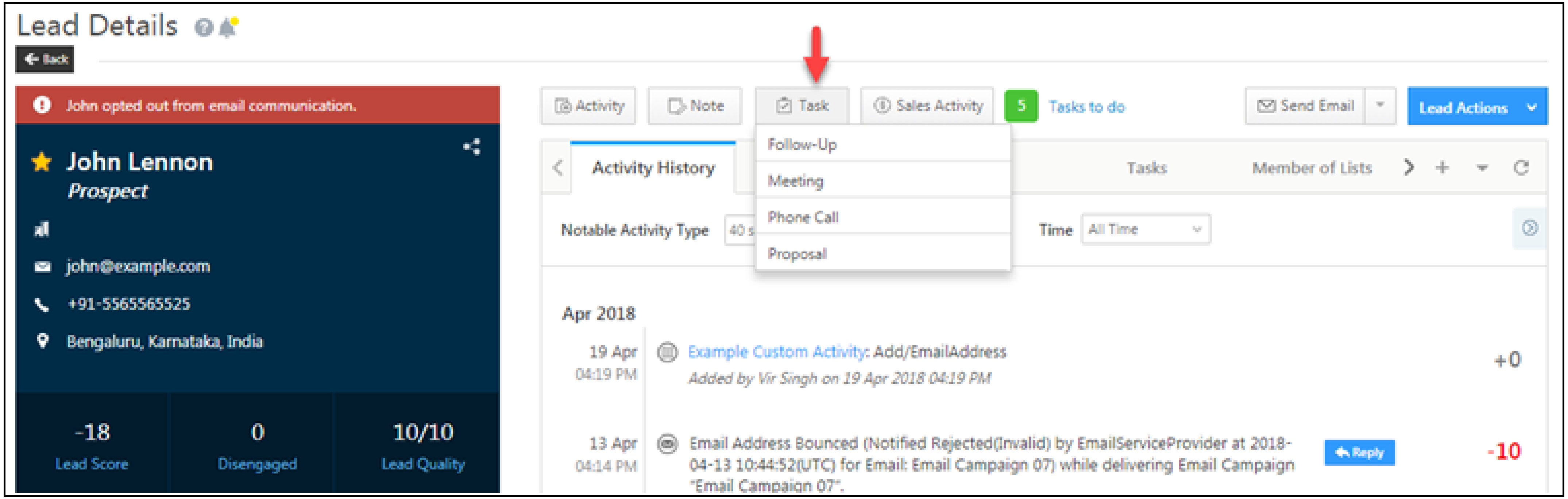
Navigate to Leads>Manage Tasks. If you're on the calendar view, you can click the **Create Task** button or even double-click on a date slot to create a task for that date (month view)




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



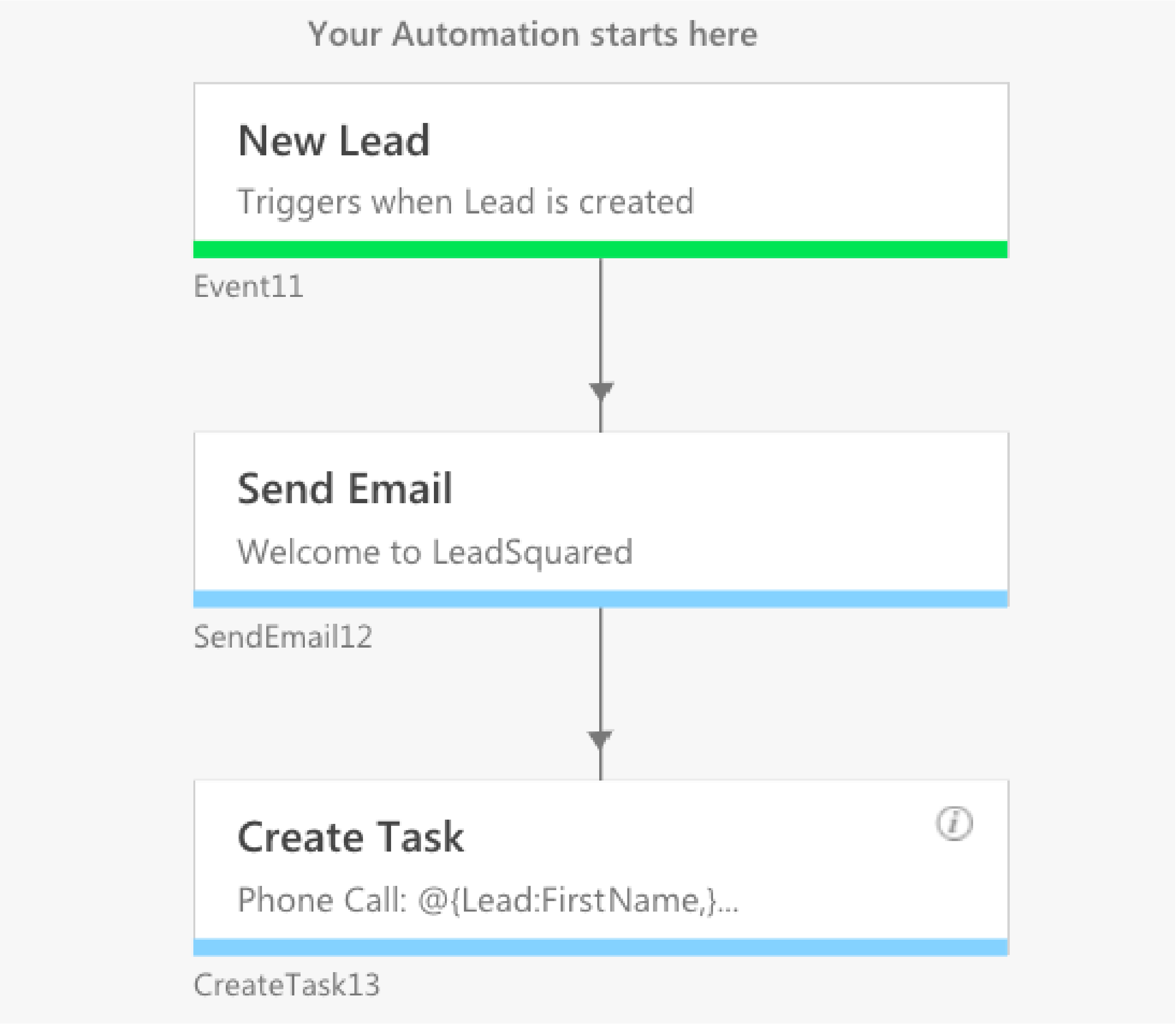

Refer [Help Article ]for details on scheduling Tasks

# 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.

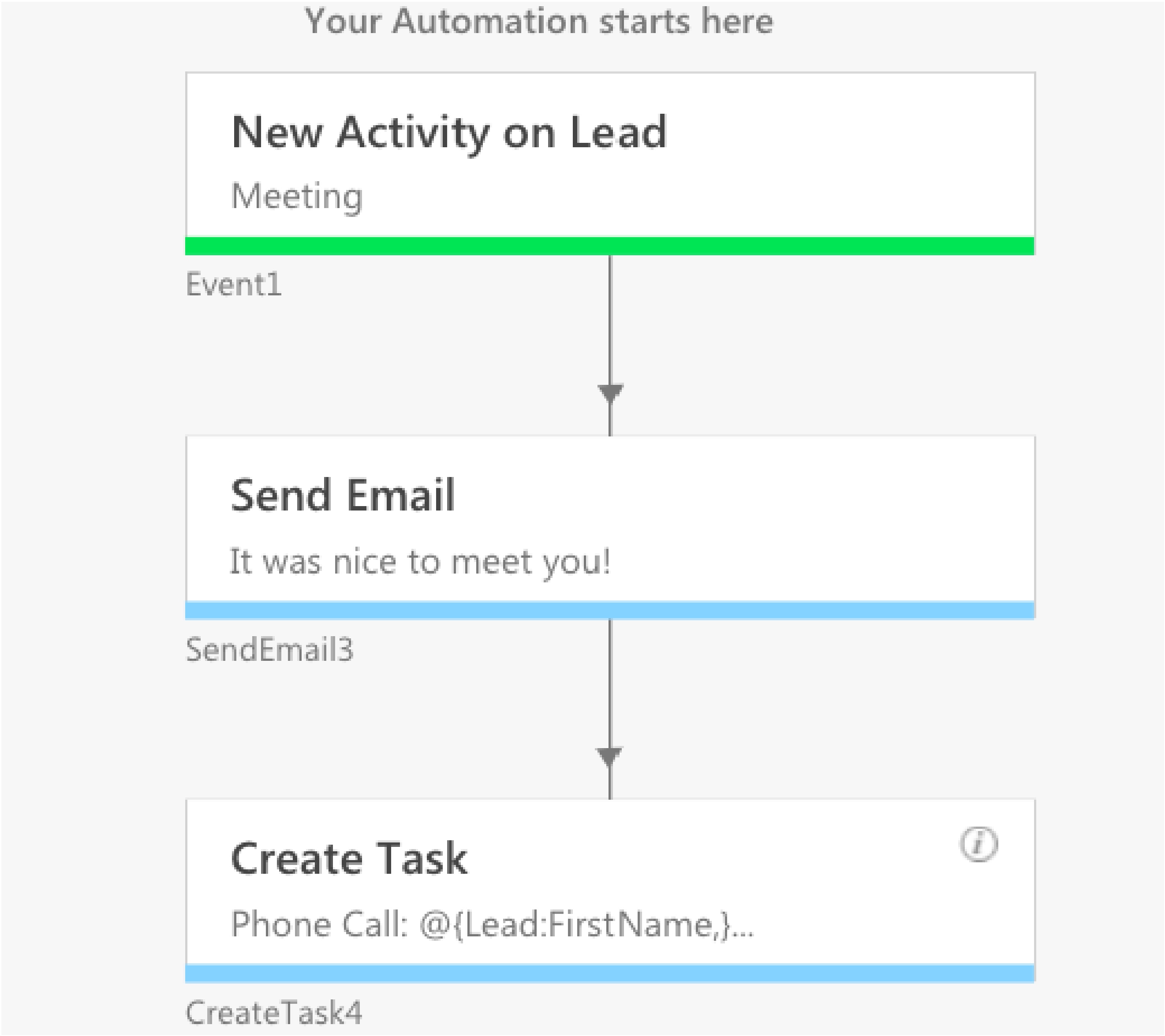


Use Case 2

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

Example:

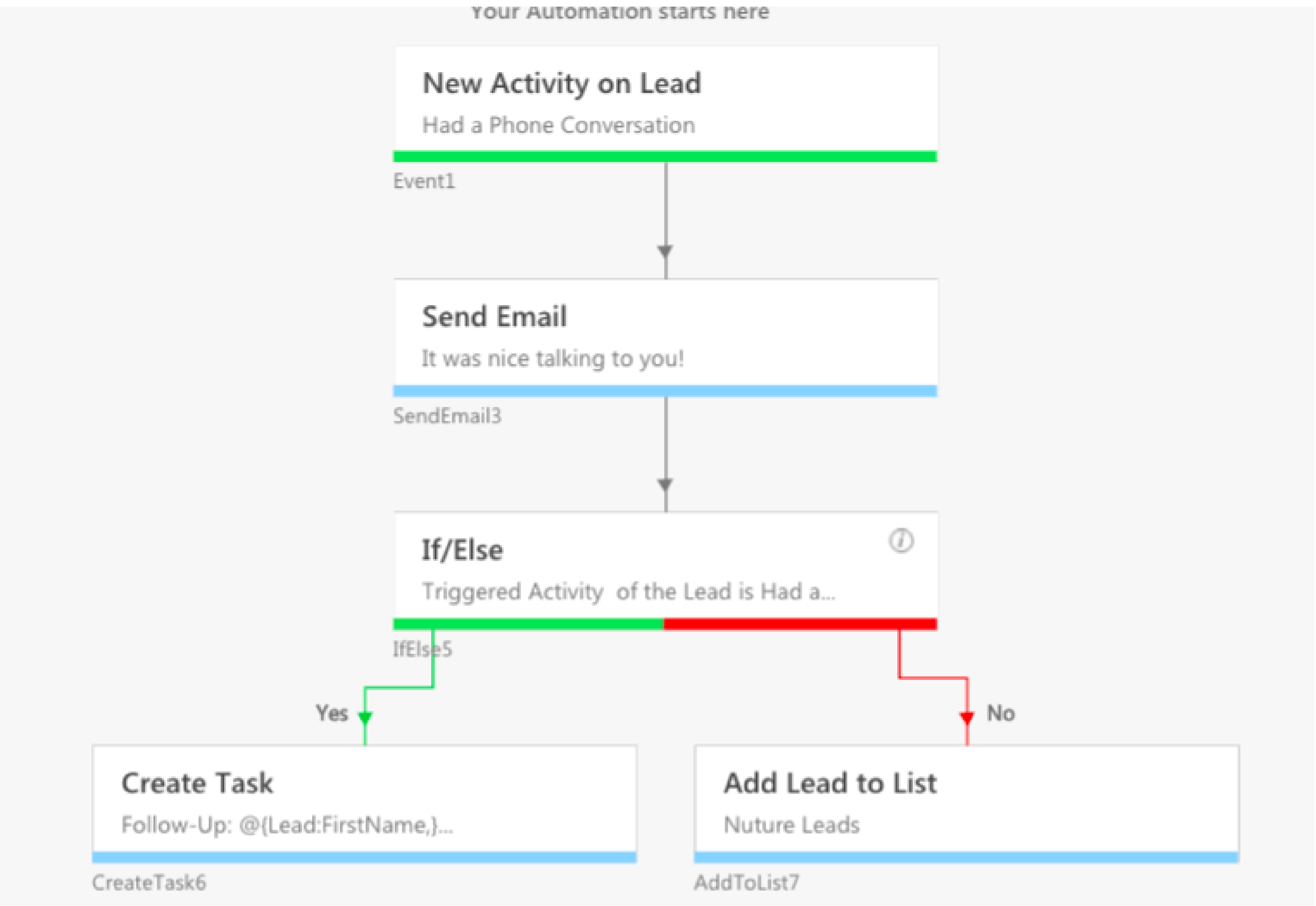
Next Follow-up Call.Lead has asked to call back on specific date and time.



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

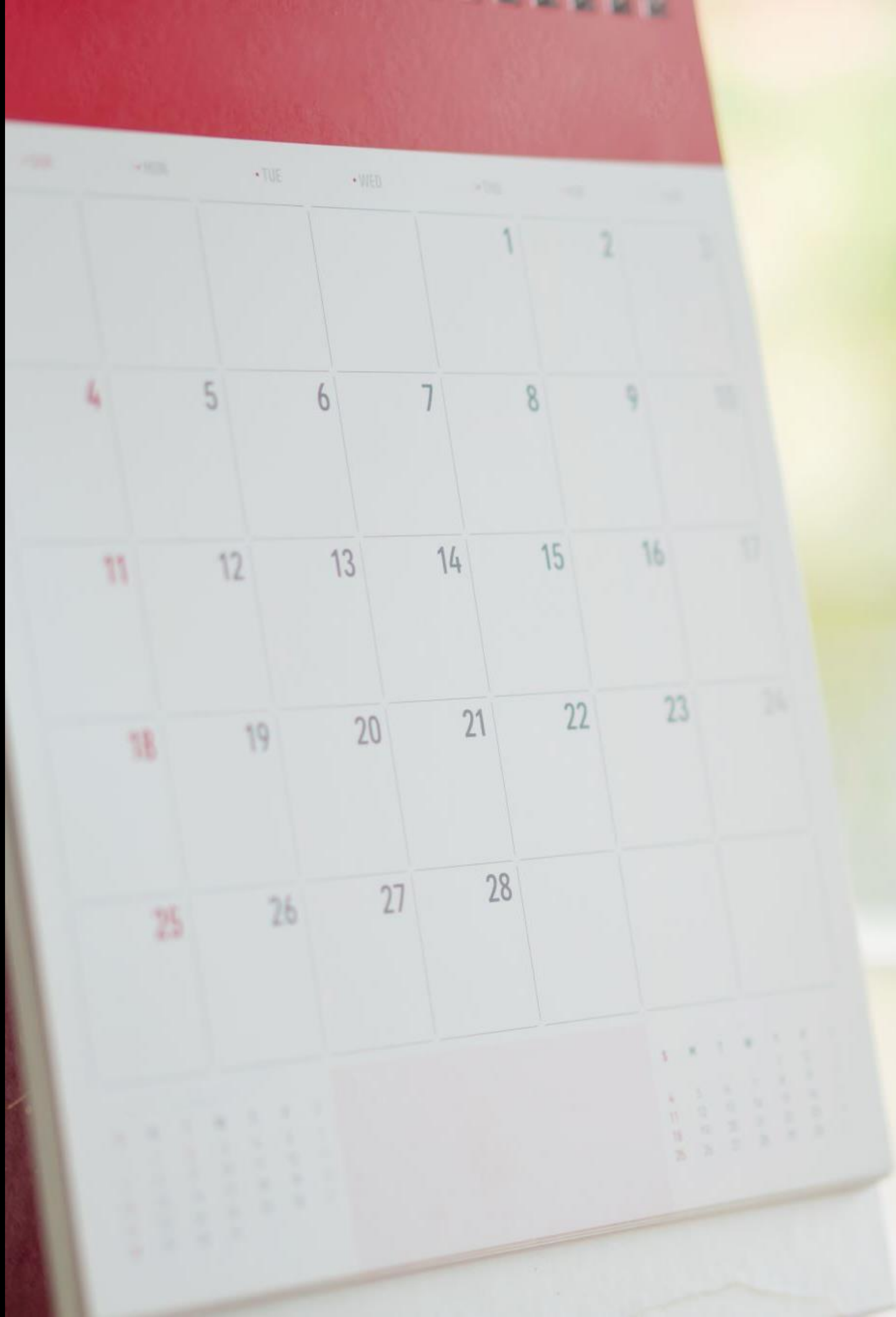
Scheduling ‘Site Visit’ for Leads and same to be done by Sales Team of Company.

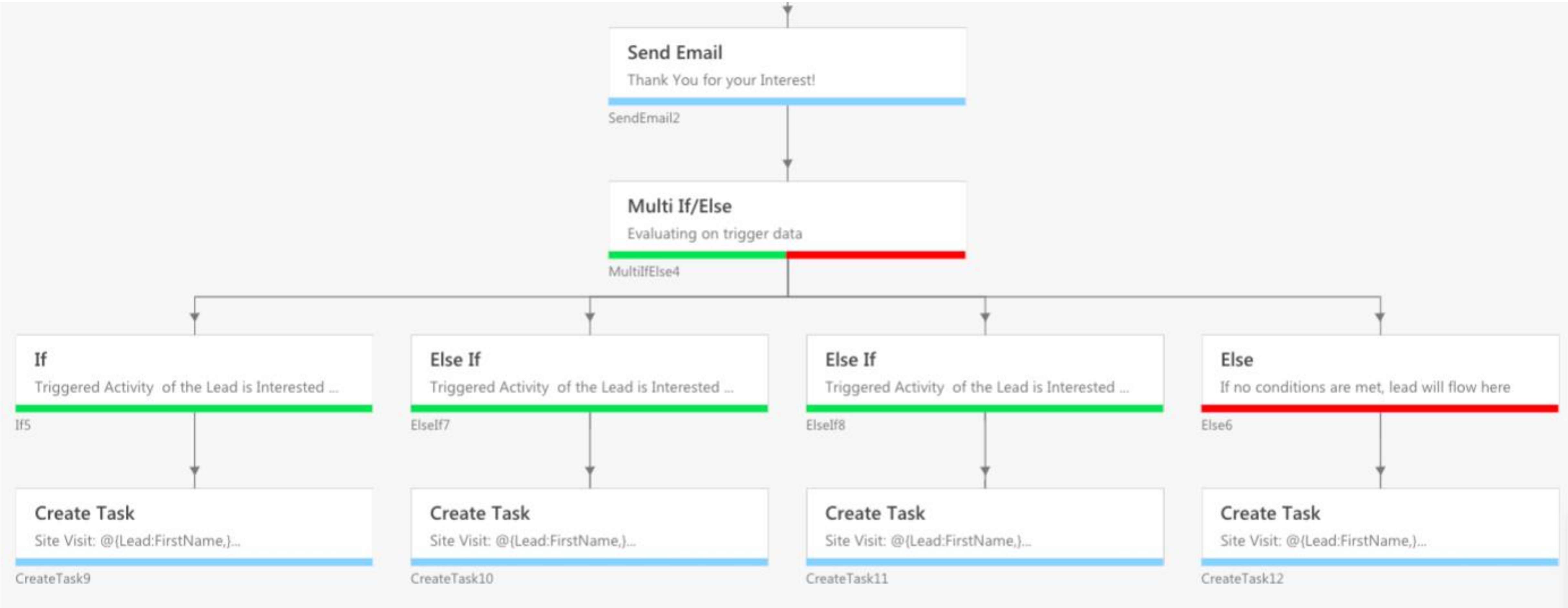
OR

Scheduling ‘Councelling Session’ for Lead and same to be done by Councelling Team.

OR

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



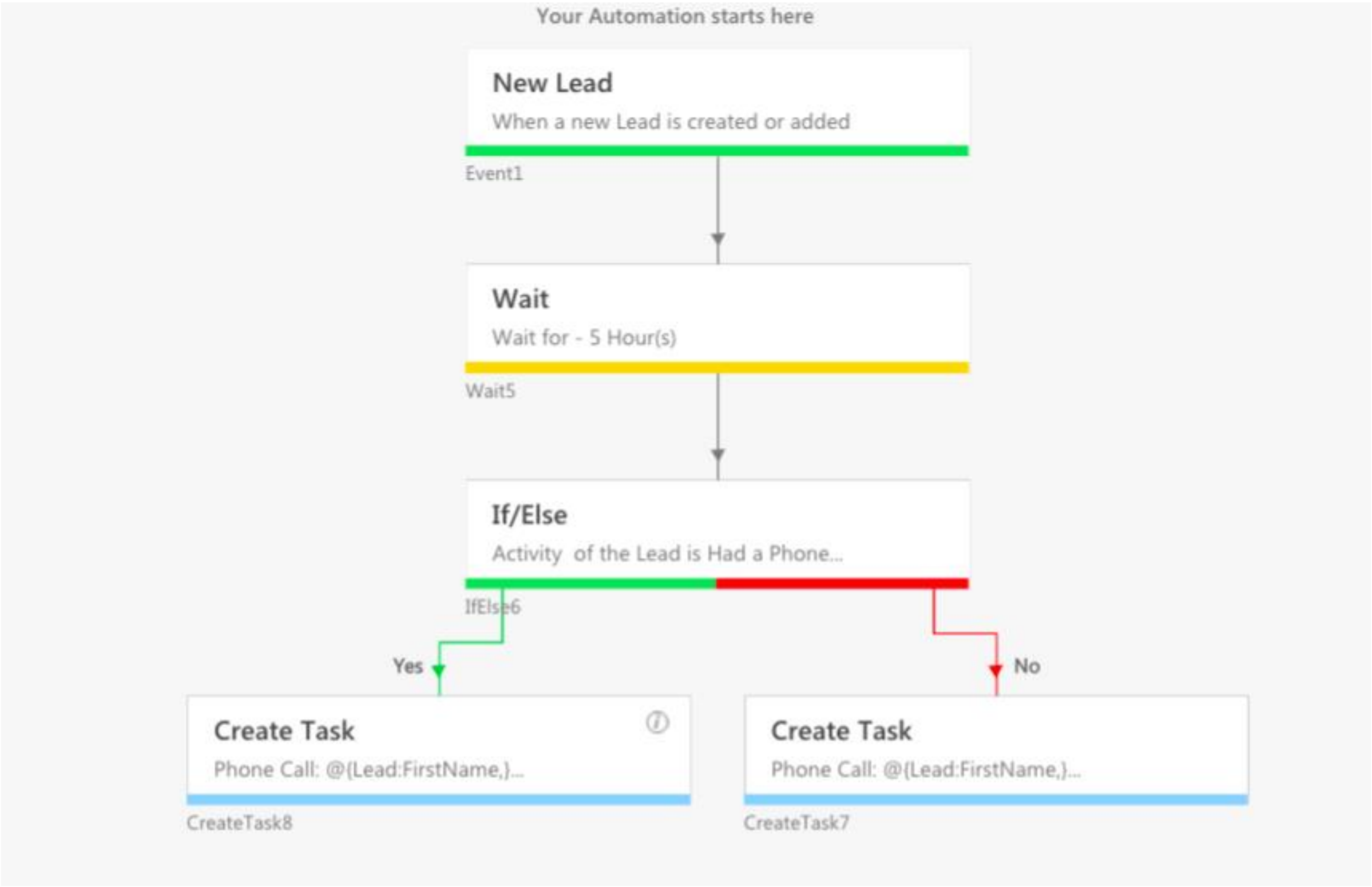



# UseCase 3 : Sample Automation

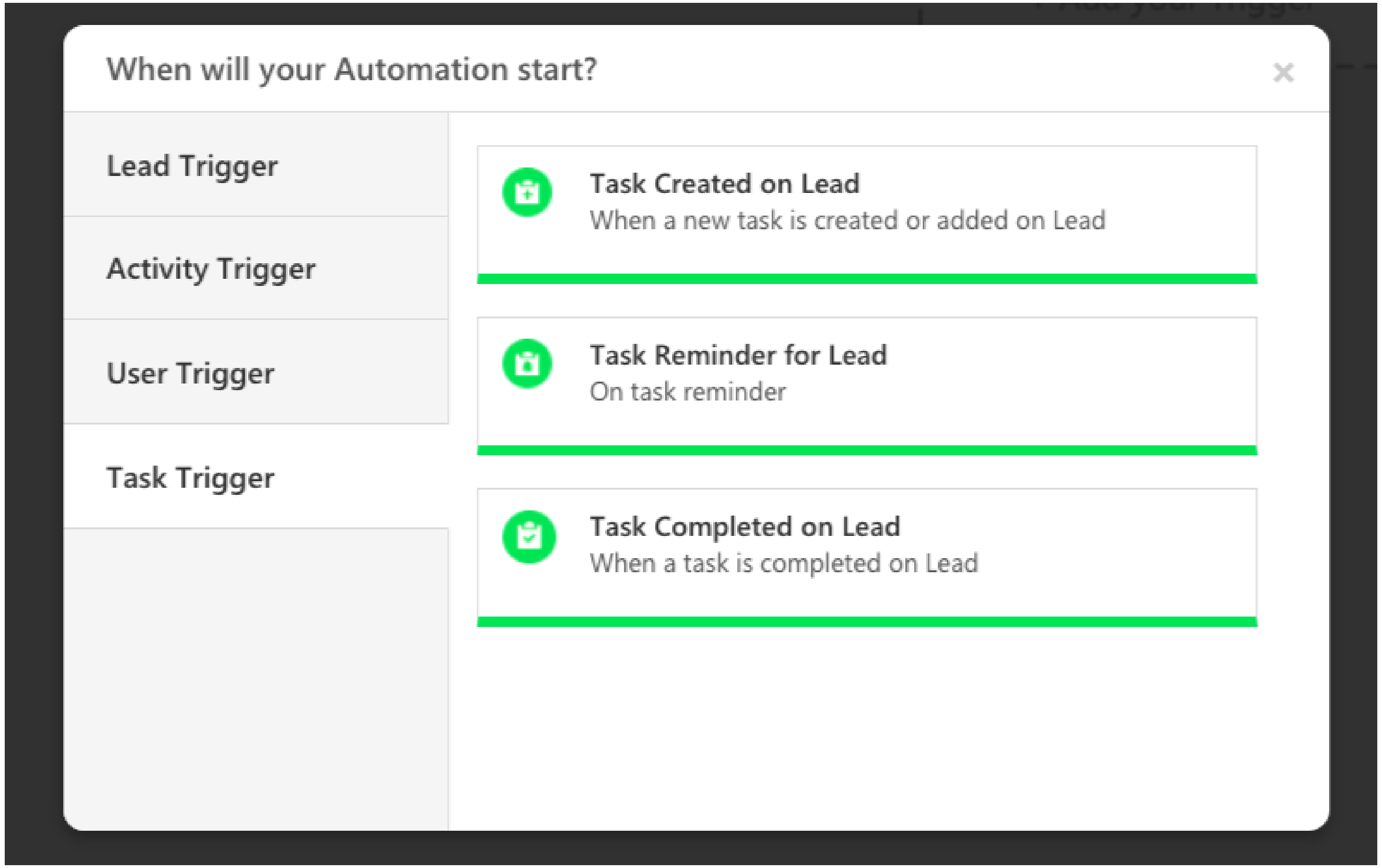
UseCase 4:

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



# Smart Views and Reports

# Steps to setup Smart Views – Task Tab

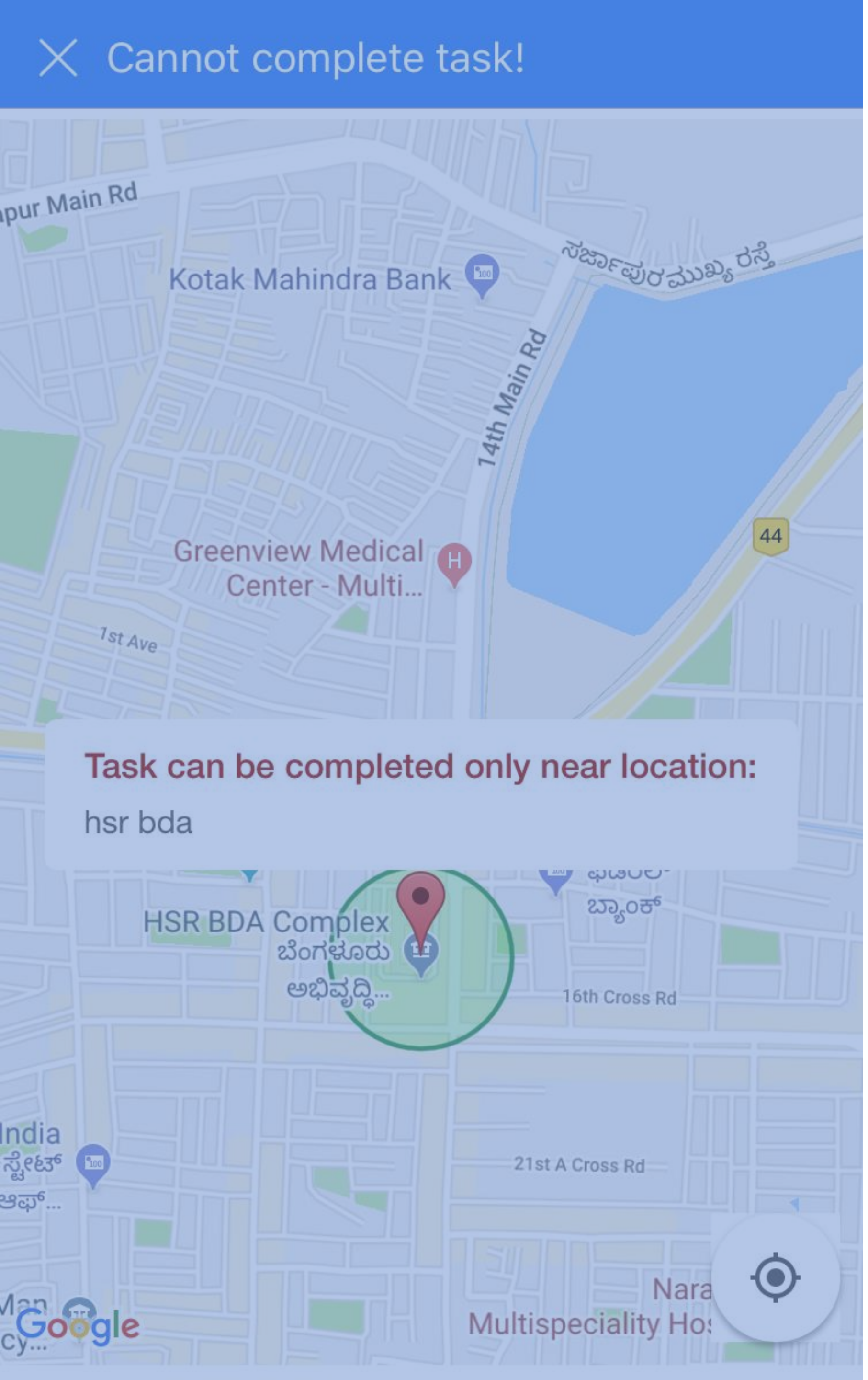
1. Goto Leads→Smart Views
2. Click the downward arrow icon alongside the default tabs to open the **List All Tabs** menu.
3. In the menu, click the **Add New Tab**.
4. In the **Add New Tab** pop-up enter –
   a) Select Type Tasks.
   b) Name – Enter a name for the tab and select a colour.
   c) Description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

Refer Help Article for more details on Smart Views

# 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

# GEOFENCED TASKS




# 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