

Task Management

Last Modified on 09/17/2018 8:16 am EDT

Tasks are custom notifications that can be added to leads, proposals, or individual customers. Creating a task from an entity (a lead) will auto populate some of the details based on that entity. Follow ups and reminders are used to identify when a task needs to be acted on and when an email/text notification should be sent, respectively. Users can create and assign tasks to themselves or others (e.g. notify a salesperson that a new lead was assigned to them). Users can also choose a loopback option that requires the original creator to sign off on the task for the task to be considered complete. Upon creating a new task, an ICS file will be sent to the assignee's email which can then be added to a calendar.

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