

Creating Task Templates

Tasks is a convenient feature that can be setup to auto populate to individual Jobs based on the Job date fields and can be pre-assigned to any of the employee fields.

To create Task Templates hover over Setup → System Setup → select Task Templates.

Select the Add  icon to start creating a Task Template

Template Name	# Tasks	Auto-Create Condition	Status
10 Step Job Management Program	3	1 Yr Warranty - Close Date	Active
Cabinets - Quality Assurance Checklist	1	None	Active
Century test	1	1 Yr Warranty - Close Date	Active
Homeowner Reminders	3	1 Yr Warranty - Close Date	Active
Reminders (Auto Emails)	2	1 Yr Warranty - Close Date	Active
Warranty Follow-up	3	1 Yr Warranty - Close Date	Active





After clicking on Add you will fill in Name, Status, Type, Auto-Create Condition, Type (Home or Community), Order, Task, Description, # of Days, Prev Depend and Assignee is displayed in the Task Template Detail page.

Name: Status: Active ▼ Type: Job ▼
Job, Project, Site & Business related merge fields are available.

Auto-Create Condition: None ▼

Project:

List Type:

Available in all

Sites:

Order	Task Type	Task	Description/Email Template	# of Days	Prev Depend	Assignee	Send Completed Task Email
1	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
2	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
3	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
4	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
5	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
6	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
7	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
8	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
9	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>
10	Standard ▼	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>	0	<input type="checkbox"/>	Supervisor ▼	<input type="checkbox"/>




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Apply the “Name” of the new template that will be added.

Name:

Select the “Type” Job or Project from the drop down. If Job has been chosen then the tasks setup within the template will need to be Job related. If Project has been chosen then the tasks within the template will need to be Project related.

Type: Job ▼
Project, S Job ss rela
Project

Select which “Auto-Create Condition” will be used from the drop-down, the condition determines when the template will generate the required tasks/actions to be performed.

Note: There are no Auto-Create Conditions available when Project has been selected for the Type and the template will need to be manually applied to the Project. When “None” is selected then the template will need to be manually applied to the Job. When “Job Creation” is selected that means all Tasks for this Template will be applied to every new job created.

Auto-Create Condition: None ▼
None
Project: Job Creation
1 Yr Warranty - Start Date
1 Yr Warranty - Contract Date
List Type: 1 Yr Warranty - Pre-Close Date
1 Yr Warranty - Sold Date
Sites: 1 Yr Warranty - Close Date
Review Date
Repair Date Start
Repair Date End

If the Template is associated with a particular “Project”, “List Type” or “Site” use your Ctrl key to make the necessary selection(s). If nothing is selected within these fields then everything will be included.

Note: All three (3) filters displayed are only available when the following Auto-Create Conditions are selected Req Review Date, Req Repair Date Start and Req Repair Date End. When the Home Creation Auto-Create Condition is selected only Community & Site filters will display.

Project:

List Type:

Available in all

Sites:

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Enter the “Task” and then the “Description” of the task. The magnifying glass is a zoom function for the Description field; this will be displayed in a pop-up dialogue box. The description can be applied within the pop-up please remember to select save before closing the pop-up.

Note: Only ten (10) tasks can be assigned to one template

Order	Task Type	Task	Description/Email Template	# of Days	Prev Depend	Assignee	Send Completed Task Email
1	Auto Email	Auto email Welcome	Welcome to Warranty	1	<input type="checkbox"/>	Supervisor	<input type="checkbox"/>
Send Email To: <input checked="" type="checkbox"/> Primary Contact <input checked="" type="checkbox"/> Secondary Contact Send Email At: <input type="radio"/> Anytime <input checked="" type="radio"/> Between 9:00 AM and 11:00 AM Note: If Task is triggered after the Between time, email will send the following day. Current File: Study Guide Proj Class.docx Attach File: No file chosen <input type="checkbox"/> Merge Attached File							
2	Standard	Call owner - 90 reminder.	90 Day Maintenance	80	<input type="checkbox"/>	Supervisor	<input type="checkbox"/>
3	Standard	Call owner - 365 day reminder	1 year reminder	300	<input type="checkbox"/>	Supervisor	<input type="checkbox"/>

IMPORTANT: The order number displayed above **is not** the order number the Tasks will assign to the Home or Community when applied. When the Tasks are added to the home they will display in Due in Days first then Alpha Order.

Enter the # of “Days” the task is to be performed and completed by. Please check (if applicable) “Prev Depend” if the next task depends on the previous task being completed. Select the “Assignee” from the drop-down, this will assign the individual responsible to complete this particular task.

# of Days	Prev Depend	Assignee
0	<input type="checkbox"/>	Warranty Rep
0	<input checked="" type="checkbox"/>	Warranty Rep
0	<input type="checkbox"/>	Project Mgr
0	<input type="checkbox"/>	Coordinator
0	<input type="checkbox"/>	Marketing Rep

When you are finished click the “Save” icon  located to the bottom left of the page.

NOTE: If this is an Auto Email task the Description field allows the drop-down to select the Email Template that will be sent.