

Managely: Tasks

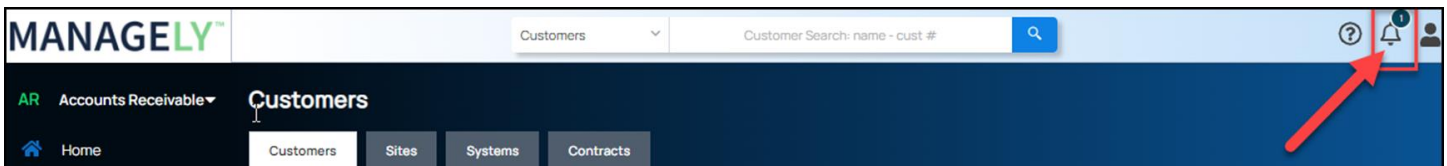
Tasks in Managely is a great feature designed to foster communication between Managely users. Users may create tasks at either the Customer level or the Proposal level within the application. A task may be assigned to the creator of the task or assigned to another Managely user.

Users can:

- Manage the task priority and status
- Set reminder and due dates
- Enter notes
- Attach documents

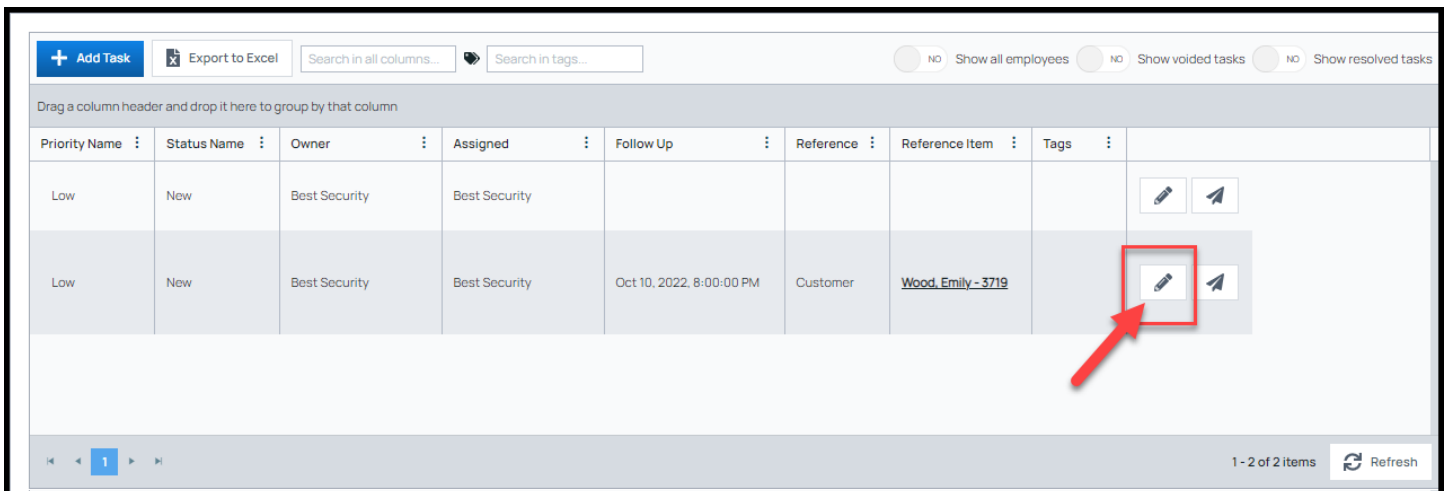
Task assignments

To locate an assigned task, find the bell icon in the upper right-hand corner of Managely. If a number is next to the icon, this indicates a task is assigned to the user and needs to be completed.



Open the Task

Click on the bell icon to display a list of all open tasks. Click on the Edit icon (pencil) to open the Task in edit mode.



Working the Task

Once a task is open in Edit mode, the user may update the task status and priority, add notes, attach documents or reassign the task, if needed.

Edit Task

Title • Contact Customer for Referral Credit

Owner • Security, Best

Assigned • Security, Best

Follow Up 10/11/2022 11:00 AM

Reminder Reminder

Status • New

Priority • Low

Reference (optional) Customer

Wood, Emily - 3719

Complete Only By Owner (Loop Back) NO

Description

Tags

Notes

Documents

+ Add Note

Note	Access Level	Modified	Modified By	Type	Expiration
No records available.					

0 - 0 of 0 items Refresh

Save

Cancel