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.

M	ANAGELY			Cu	stomers	Customer Search: name - cust #	⑦ 4 [₽] ≟
AR	Accounts Receivable -	Customer	s				
ñ	Home	Customers	Sites	Systems	Contracts		

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.

+ Add Task	Export to Excel	Search in all column	S Search in tags			NO Show all emp	oloyees N	Show voided tasks NO Sh	ow resolved tasks		
Drag a column head	Drag a column header and drop it here to group by that column										
Priority Name	Status Name	Owner	Assigned	Follow Up :	Reference :	Reference Item	Tags :				
Low	New	Best Security	Best Security					<i>I A</i>			
Low	New	Best Security	Best Security	Oct 10, 2022, 8:00:00 PM	Customer	<u>Wood, Emily - 3719</u>		0 1			
H 4 1 >	H							1 - 2 of 2 items	8 Refresh		

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							×
				1			
Title •	Title Contact Customer for Referral Credit			Reference (option:	Customer		*
Owner •	Security, Best				Wood, Emily - 371	9	Ψ
Assigned •	Security, Best			Complete Only By O (Loop Bac	Owner NO		
Follow Up	Follow Up 10/11/2022 11:00 AM						
Reminder	Reminder Reminder			Descriptio	ion		0/500
Status •	Status • New			Та	ags		
Priority •	Low						
Notes Docum	ents						
+ Add Note							
Note	:	Access Level	:	Modified : N	Modified By	Туре :	Expiration
					vailable.	·	
H 4 > H						0 - 0 of 0 items	P Refresh
			Save	Cancel			