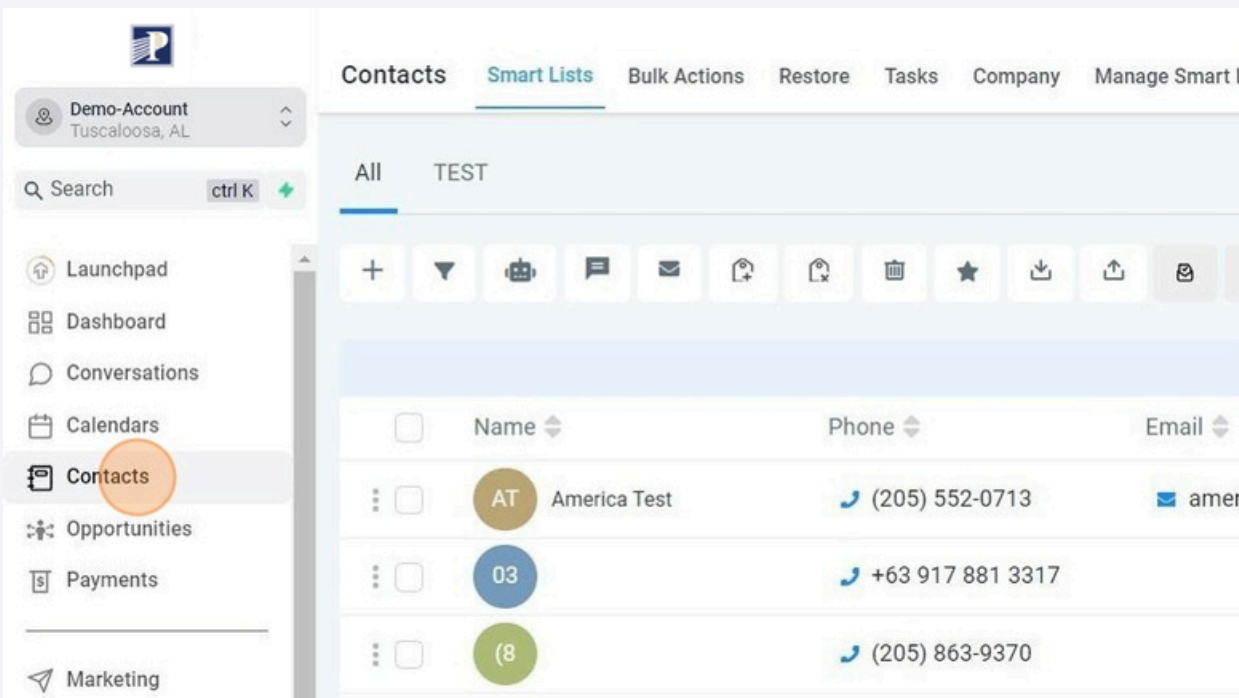


Notes & Task: How To Manage Task List, View, Close, and Edit Task

This guide provides a step-by-step process on how to manage task lists, including searching, filtering, closing, and editing tasks. It also includes instructions on marking tasks as complete and opening tasks for further actions. If you want to effectively manage your tasks and stay organized, this guide is a must-read.

1 Click **Contacts**



The screenshot displays the CRM interface. On the left sidebar, the 'Contacts' menu item is highlighted with an orange circle. The main content area shows the 'Contacts' view with tabs for 'Smart Lists', 'Bulk Actions', 'Restore', 'Tasks', 'Company', and 'Manage Smart Lists'. Below the tabs, there are filters for 'All' and 'TEST'. A toolbar contains various action icons. The contact list is shown with columns for Name, Phone, and Email.

	Name	Phone	Email
<input type="checkbox"/>	AT America Test	(205) 552-0713	amer
<input type="checkbox"/>	03	+63 917 881 3317	
<input type="checkbox"/>	(8)	(205) 863-9370	

2 Click Tasks

Contacts Smart Lists Bulk Actions Restore **Tasks** Company Manage Smart Lists

All TEST

<input type="checkbox"/>	Name	Phone	Email
<input type="checkbox"/>	AT America Test	(205) 552-0713	america@mogulclients.com
<input type="checkbox"/>	03	+63 917 881 3317	
<input type="checkbox"/>	(8)	(205) 863-9370	

3 Search a task by clicking the Search by task name

Contacts Smart Lists Bulk Actions Restore **Tasks** Company Manage Smart Lists

Task List

Search by task name

<input type="checkbox"/>	Name & Description	Contact
<input type="checkbox"/>	Title fo your TAsk Type Here the description	AT america test
<input type="checkbox"/>	hello	JT jeffrey test
<input type="checkbox"/>	test	jeffrey test

4 Filter: Click **Assignee** and select the the task assigned to a specific user.

Task	Assignee	Due Date	Status
ca test		10:00am (CDT)	⊘
y test	Beatrice Hill	8:00am (CDT)	✓
y test	Beatrice Hill	9:00am (CDT)	✓
f nalls	Justin Nalls	8:00am (CDT)	⊘
ordon	Justin Nalls	May 9 2023, 12:00am (CDT)	✓

Page Size 25 ^

Previous Next

5 Filter: Click **Status** and select the status you want to see.

Task Lists | ⚙️

New Task

Clear all Filters Contact Assignee 1 Status All Sort By Due Date (Desc)

Task	Assignee	Due Date	Status
rica test	America Osorio	May 22 2024, 10:00am (CDT) Overdue By 1 Day	⊘

Page Size 25 ^

Previous Next

6 Filter: Click **Sort By** and select how you want to sort the task list

Clear all Filters Contact ▾ Assignee 1 ▾ Status All ▾ Sort By Due Date (Desc) ▾

	Assignee	Due Date
rica test	America Osorio	May 22 2024, 10:00 Overdue By 1 Day

Page Size 25 ^ Previous Next

HOW TO CLOSE/COMPLETE A TASK

7 Click here to mark as complete

Contact ▾ Assignee ▾ Status All ▾ Sort By Due Date (Desc) ▾

	Assignee	Due Date	Status
ca test	America Osorio	May 22 2024, 10:00am (CDT) Overdue By 1 Day	Mark as Complete
y test	Beatrice Hill	May 5 2024, 8:00am (CDT)	✓
y test	Beatrice Hill	Apr 22 2024, 9:00am (CDT)	✓
f nalls	Justin Nalls	Mar 11 2024, 8:00am (CDT) Overdue By 73 Days	○

8 You can also open the task by clicking the task title.

The screenshot shows a software interface with a sidebar on the left and a task list on the right. The sidebar contains menu items: Calendars, Contacts, Opportunities, Payments, Marketing, Automation, Sites, Memberships, Reputation, Reporting, Marketplace, and Settings. The task list displays five tasks, each with a checkbox and a title. The third task, "Please Call 3-5 Day After The Service", is highlighted in grey. An orange circle highlights the task title. A tooltip is visible over the task, showing details like "Name: . Please Call", "ServiceDescription: give your condole", "OR CLEAR THIS TA", and "AFTER 202". The task list also shows "Showing 1 to 5 of 5 results".

9 It will take you back to the account and there you can mark the task as complete.

The screenshot shows a mobile application interface for a task detail view. At the top, there are five circular icons: a green phone icon, a green speaker icon, an orange bell icon, a blue question mark icon, and a purple circle with "AO". Below these is a toolbar with icons for refresh, checkmark, edit, calendar, document, and currency. The main content area shows a task card for "Please Call 3-5 Day After The Service". The card includes a red "Overdue By 73 Days" warning, the task description "Please call and give your condolences for the passing of John Doe. DO NOT CALL OR CLEAR THIS TASK UNTIL 5 DAYS AFTER 2024-03-06", the due date "Due: Mar 11 2024, 8:00am (CDT)", and the assignee "Assigned: Justin Nalls". There are also icons for a checkmark and a trash can.