NORDIC

REINVENTING

M5

BUSINESS EMAIL

MARK5 | *Task module guide*

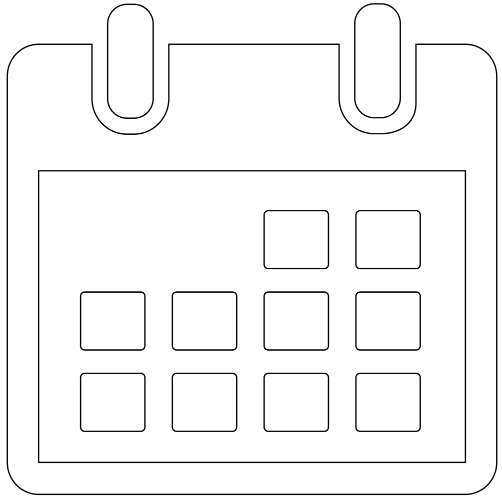
0.0 | *Welcome*

In this guide we will help you understand and use the Task Module in MARK5. You will get to know the work area, create a task and an appointment and you will learn how to edit and delete.

1.0 | Short-keys

2.0 | Task module

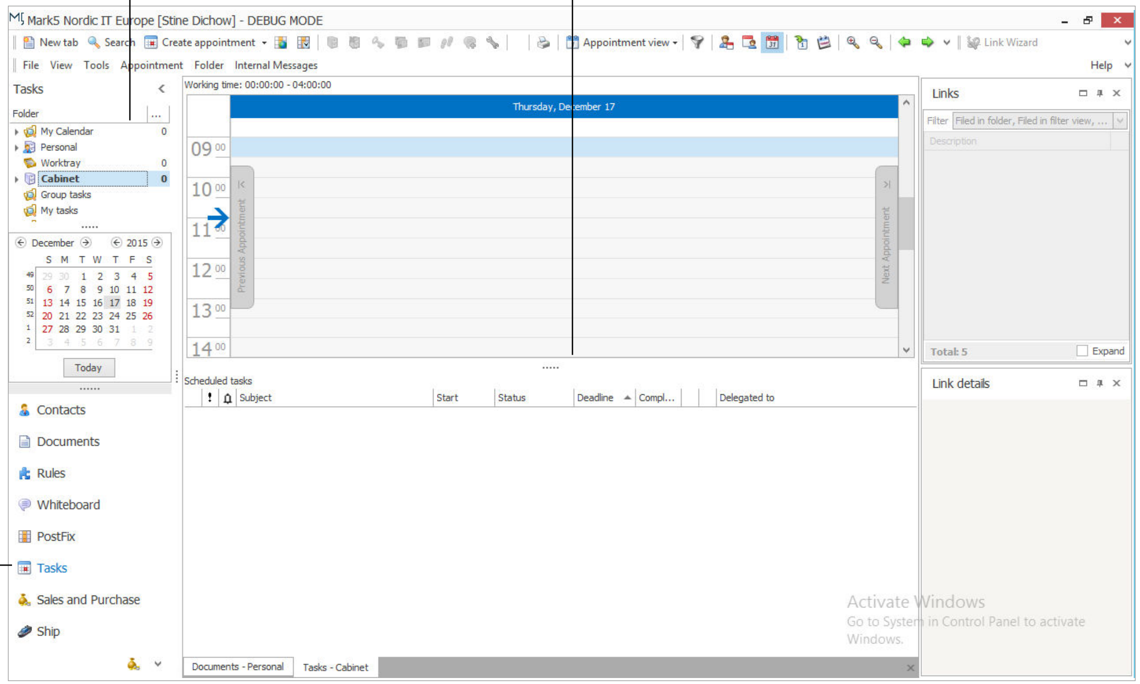
In this lesson you will get to know the **Task module** in MARK5. The task module serves **two purposes**:
1 | It is your regular **calendar** where you can **create appointments**.
2 | It keeps track of your **daily tasks**. In the module you can manage your daily activities by creating **tasks** and **appointments**. You can use the module individually or you can **assign tasks** to **emails**, **contacts** or **other objects** in the system. Tasks can be either **personal** or **delegated** to others so the company can benefit from an improved transparency of its employees, department or organisational activities. To understand the module, we will first go through the **task work area**, and then learn how to create first **tasks** and then **appointments**.



2.1 | Task work area

1

2



Click here to enter the Task Module

Let us start by having a look at the task work area. To access the module choose task from the lower left side of the screen.

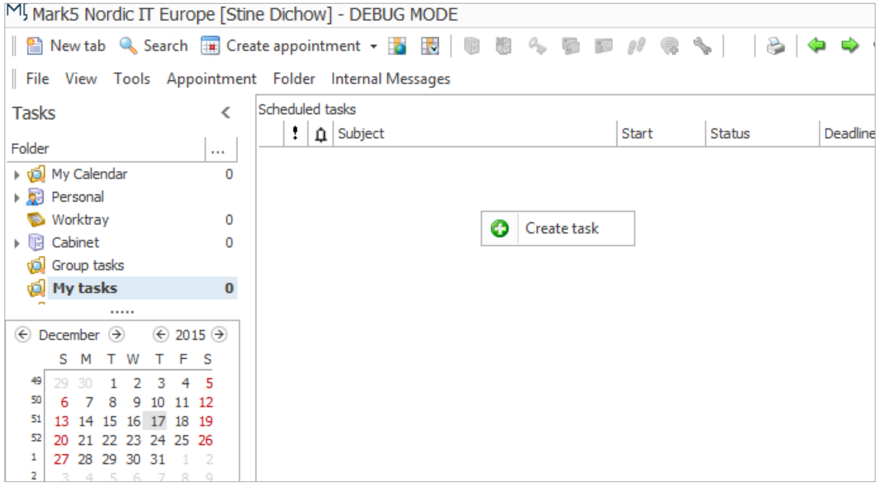
This will change your screen to the task work area as viewed above. Lets quickly go through how you navigate in the module.

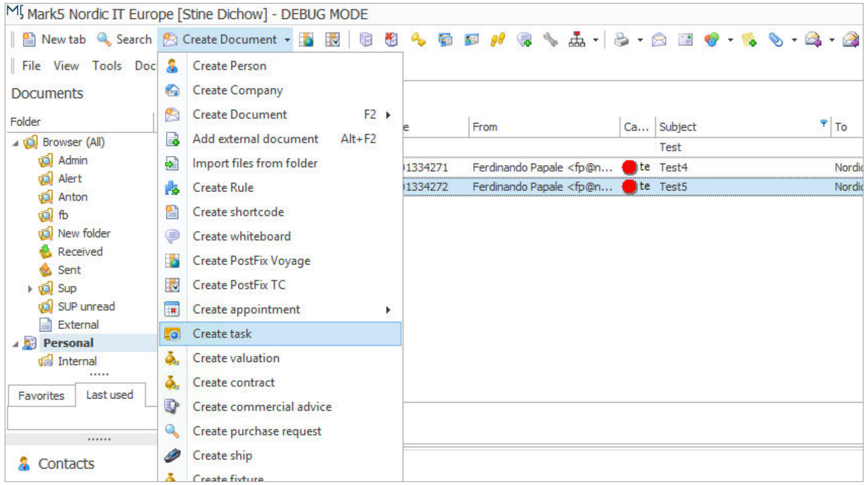
1 | Navigate between calendar and task folders. Here you choose calendar, cabinet, task and more specified folders. Choose my calendar to view your calendar with assignments, cabinet to view a preview of both calendar and tasks and my tasks to view tasks. The centre of your screen will change as you switch between folders.

2 | Views the content of the chosen folder.

NOTE | You can also view the task module within other modules of MARK5. Just press F12 and a preview of the task panel pops up for easy access.

2.2 | Create task



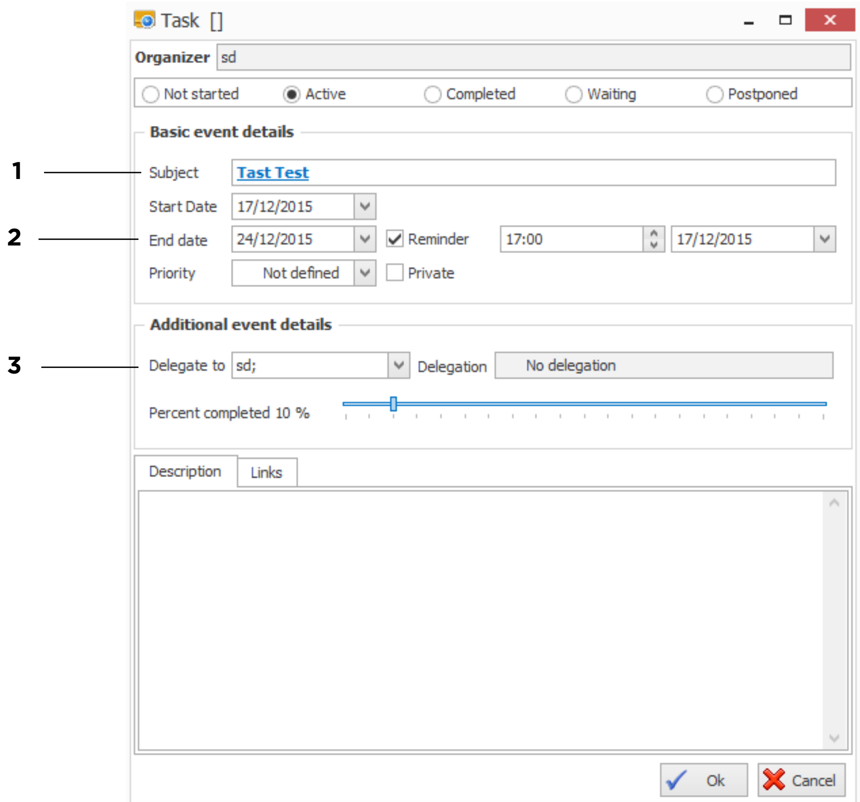


Now, lets learn to create a task. A task can be a project or an assignment that you need visible in the system. Tasks are preferable, if you wish to log an on-going project or daily assignments.
When you are in the task module you view tasks by choosing my tasks from the folder view in the left side of the screen. Here you can also create task, just right click directly on the screen and choose create task.

No matter which module you are in, you can always create a task from the menu by choosing the drop down beside create. Just scroll down and choose create task.

Either way, this will open your create task window, similar to the screenshot on the next page.

2.2 | Create task



Above we have the task window. Here, go through the following steps:

1 | In subject you name the task.

2 | Set start and end date. You can also choose if and when you want a reminder and if the task should be private and only show on your screen.

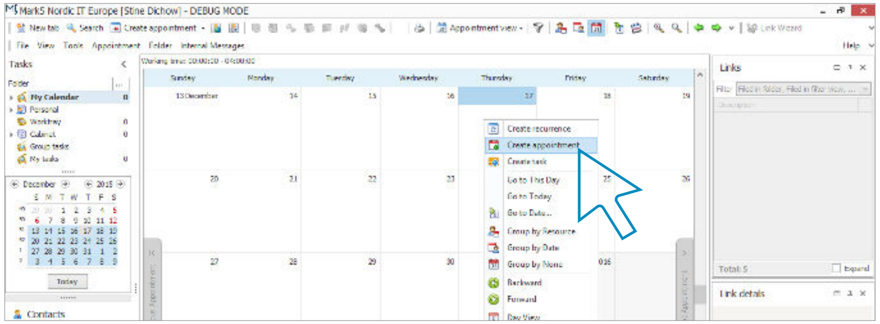
3 | In delegate, choose which user you want to delegate the task to. Below you see percentage completed where you can set how close the task is to be completed. You can adjust continuously. Under description, you can add further details to the task. When you are done, press ok.

2.3 | Create appointment

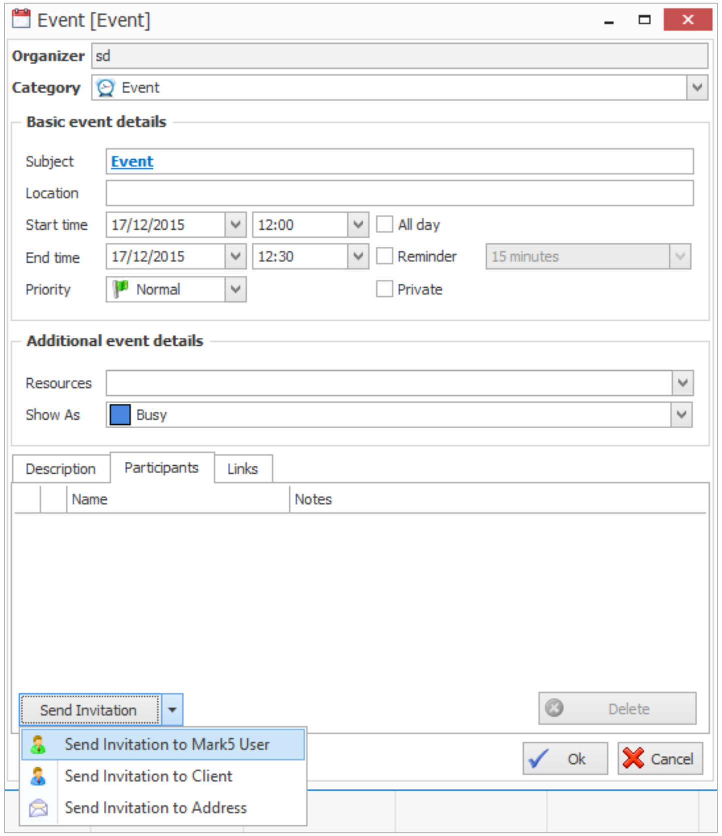
You can view appointments from the calendar. Appointments are preferable in relation to daily activities. When you create an appointment the process is similar to a task: Follow the same instructions as we just learned to create task (page 06). Just choose appointment instead of task.
Also, from the task module, you can go to my calendar and right click on the calendar preview to create appointment
Choose appointment and a new window opens, similar to screenshot 2.

Compared to a task, an appointment allows you to add other users as well as invite clients to the appointment. Click on Participants and click on Send Invitation. Choose what kind of participant you wish to invite. A small windows appears, that tells you to save the appointment before you can send invitations. Click ok, and you will be able to select users.

1.



2.

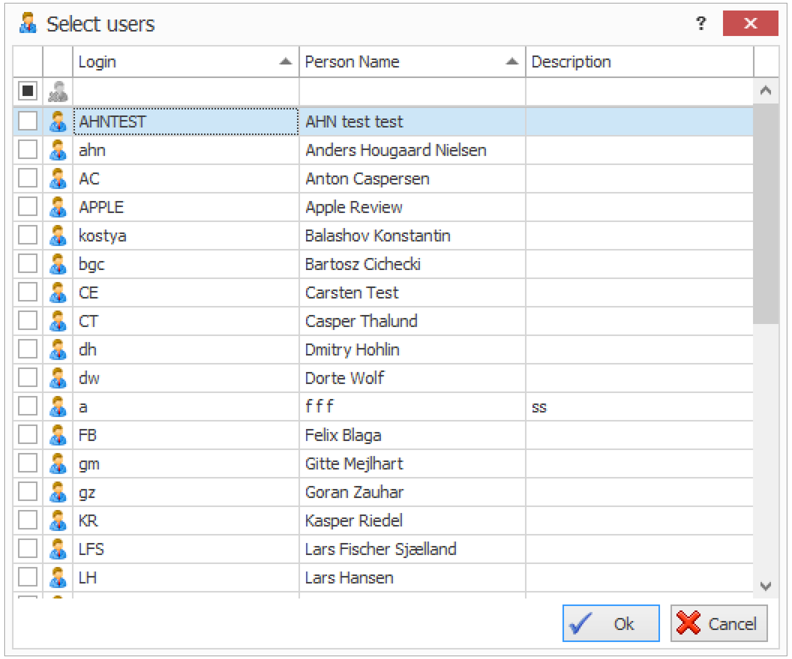


2.3 | Create appointment

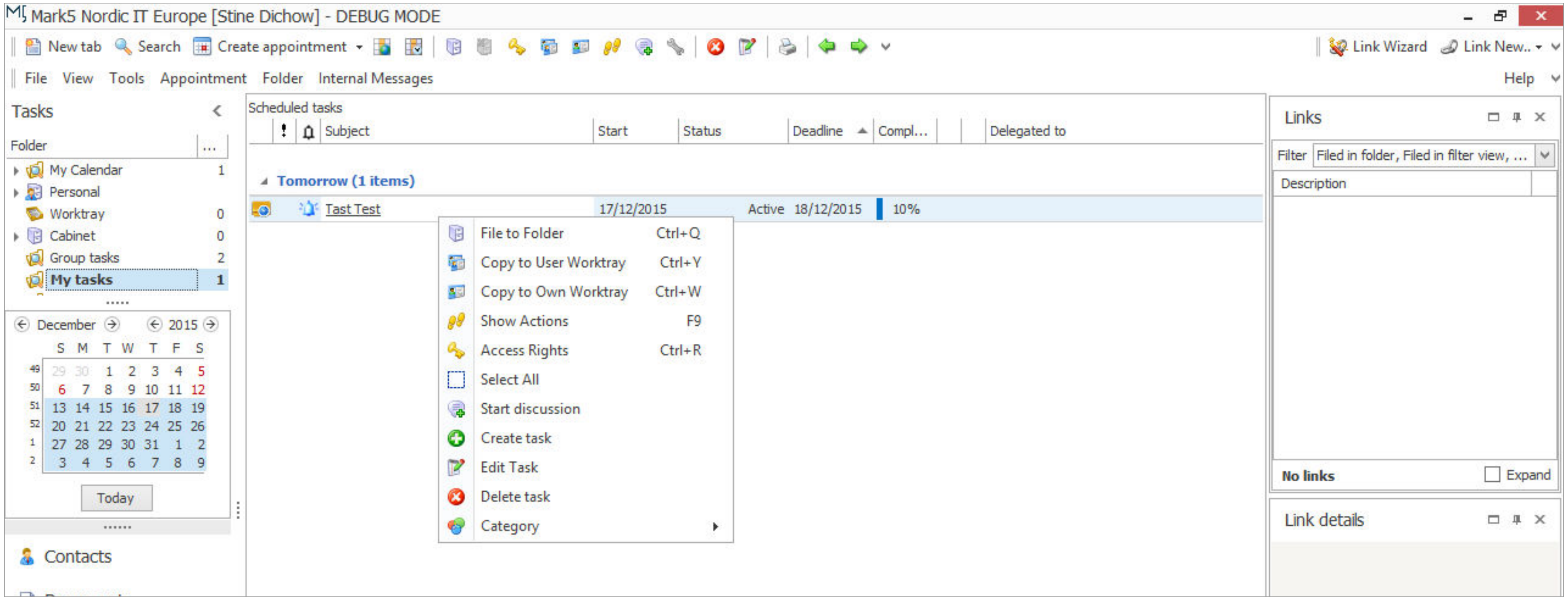
Above you see the **select users window**. Here, you can **add other users**. When you finish, click **ok**. You will now return to the **create appointment window**, where you finish by clicking **ok**.

NOTE | You can add from all contacts. If you click **invite clients** instead of add you will be able to choose freely from all **contacts**.

NOTE | You can **search** through users in the top column.



2.4 | *Edit and delete*



If you wish to add, edit or delete appointments or tasks, you can always just mark them, and right click. This opens your options. As the picture shows, you can file, show actions, edit access rights, create, edit and delete task. You can do the same with appointments.

EXERCISE | Create a task and delegate the task to a colleague. Create an appointment and add at least two other users to the appointment.