Manual for User Tasks

Login as a Bti User => tools => Crm entries.

Crm Dashboard: Overview of the Tasks.

User Tasks: Create and view Tasks.

- Green Dot => Due Date in the future
- Yellow Dot => Due Date today
- Red Dot => Due Date in the past

Create a Task for a Myself:

1. Go to *User Tasks*.
2. Click on *New Entry*.
3. Choose *Due Date* (Due Date must be in the future).
4. Fill in *Text*, and *Contact* information
5. Click *Save Entry* Button.

Add Note or Interaction to Task, Note or Interaction:

1. Go to *Crm*.
2. Click on *Assignee Name*.
3. Click on +*append*.
4. Fill in data.
5. Click *Save Entry* Button.

Change Status of a Task:

To change the status, the Task must have a Note or Interaction attached.

1. Go to *Crm*.
2. Click on *Assignee Name*.
3. Click on *Change Status*.
4. Fill in data.
5. Chosse *Status* (Completed or Close without complete).
6. Click *Save Entry* Button.

To delete a Task:

Only the creater of the Task, Note or Interaction can delete the entry. A Task can only be deleted if the Task is Completed or Closed without complete.

1. Go to *Crm*.
2. Click on *Assignee Name*.
3. Click on *delete*.

Note: On the Bti Dashboard after the login as a Bti User, a bar will appear on the top, if a task due date is today or in the past. You can click on *manage* and go directly to the Crm Dashboard.