

Task Manager

You can open tasks for items that need to be fixed or formatted on your site. This puts your item in line in the Task Manager as soon as they open it. This task will be assigned to the appropriate party and closed within normal service level agreements.

View Tasks Tab

Displays all open and closed tickets

Viewing a Task

To open a task, click on the name of the task.

To post a comment or update on the task, type in the white box and then click Post Followup.

You can search tasks using the Search tool on the right.

New Tasks Tab

Allows users to open a new task.

Creating a new Task

1. Select the name of the project from the drop-down. Most clients will only have one to choose from, but certain users have access to multiple sites, so these users will need to select which site the task is referring to.
2. Enter a summary – This is the subject line of the task.
3. Enter a description of the task using the Details box.
4. If any related documents (print screen, excel file, etc.) need to be uploaded, use the Browse button to attach them.
5. Save.