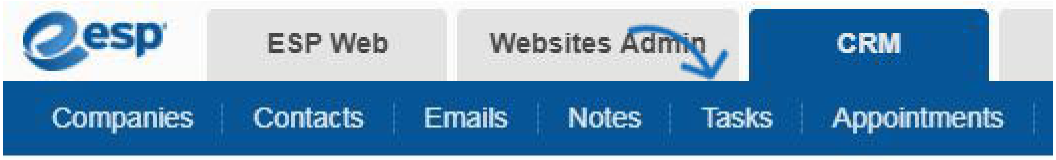
Adding and Editing Tasks in CRM

Jennifer S - 2018-03-17 - in CRM

The Tasks enable you to manage the daily tasks for your business.

To create a new task in ESP CRM, click on the Tasks option.

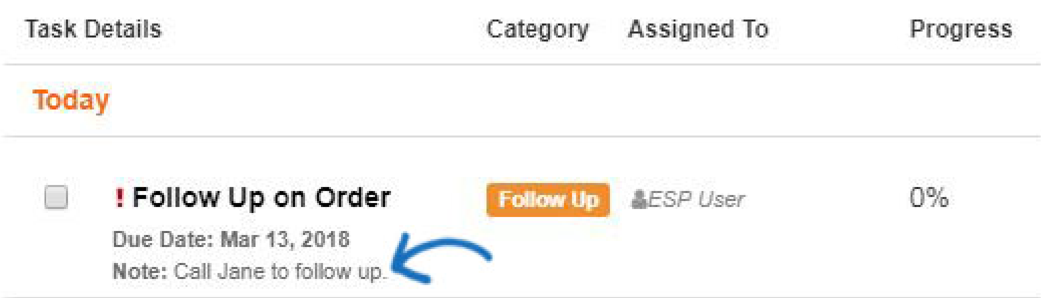


Click on the Add button.

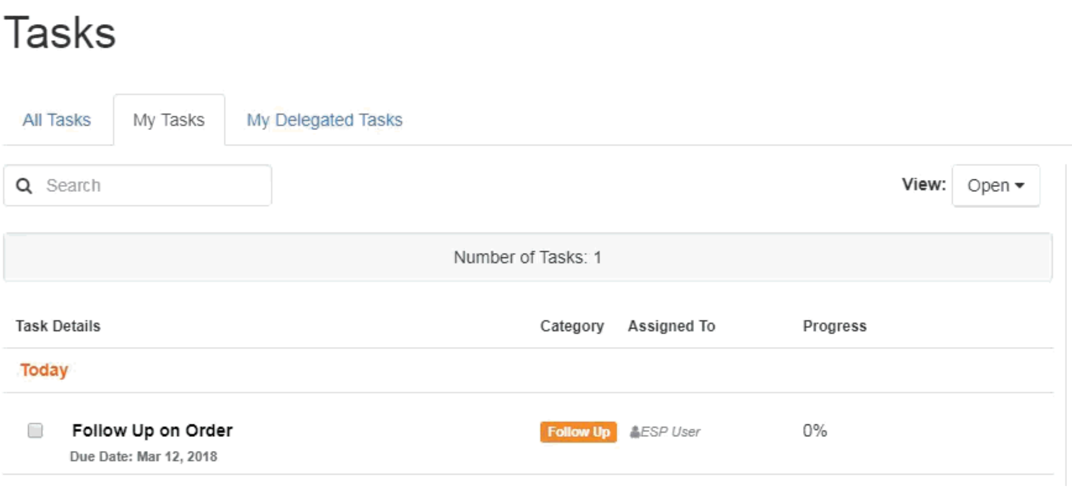
In the Add Task window, enter the task name. You can use the additional fields to enter more descriptive information about this task. You can use this drop down to select a category, such as email, meeting, phone call, etc.

When you are finished, click on Save.

After creating a task, you are able to edit the task and add notes.



Clicking on the task name will open the Task Details page.



Then, type the note in the available window and click on Save. Multiple notes can be added to a single task, but only the most recent note will be displayed on the tasks homepage.