



Default Tasks



Jennifer S - 2019-06-07 - in ESP Admin

Administrators can set default tasks by going to the avatar in ESP, clicking on Settings, and then selecting Default Tasks from the side navigation.


Default Tasks in the ESP Admin area enables you to configure automatic follow-up tasks that will be created when Order documents are generated in ESP. Task options such as who the order documentation should be assigned to and its due date. Individual tasks can be created per document or per product line item.

To create and manage these defaults, click on the Avatar, click on Settings. Click on Default Tasks from the options on the left.

In the Default Tasks area, you will see all previously created default tasks. Use the pencil icon to edit an existing default task or click on trash can icon to delete it.

Document Type	Name	Assigned To	Due	Per	Link To	Reminder	Priority	
Sales Order	New Orders	Salesperson on the order		Order	Supplier	Yes	Medium	 

To create a new default task, click on the "+ Add Default Task" button.

Default Tasks 

[+ Add Default Task](#)

Configure automatic follow-up tasks that will be created when Order documents are generated in ESP. Choose task options such as who it should be assigned to and when it should be due. Individual tasks can be created per document or product.

Document Type	Name	Assigned To	Due	Per	Link To	Reminder	Priority
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Enter a task name and select to whom the task should be assigned. You can chose to have tasks assigned to the "Sales Person on order" or select a specific user from the dropdown. Use the additional dropdowns for Category, Visibility, and Priority to define the parameters of this default task.

Edit Default Task ✕

Task Name *

Assigned To **Category**

Visibility **Priority**

Use the Due Date options to select:

- No Due Date
- Due Same Day
- Due in [Enter Number] Days

Due Date

No Due Date

 Due Same Day

 Due In **Days**

The default Effective Date will be the current day. Use the calendar icon to select a future date.

Entering information in the Description box is optional. Select the Document Type from the available option. Use the "Per" option to set this task to be applied to the order or to each product line item. You can also link this task to the Customer, Decorator, or Supplier. If you would like to have reminders created for this task, make sure the "Send Reminders" checkbox is marked.

Document Type *

Sales Order

Sample Request

Quote

Invoice

Per

Order

Product Line Item

Link To

Customer

Decorator

Supplier

Send Reminders

When you are finished configuring the default task, click on the Save button.