Tasks

06/18/2025 9:53 am CDT

Overview

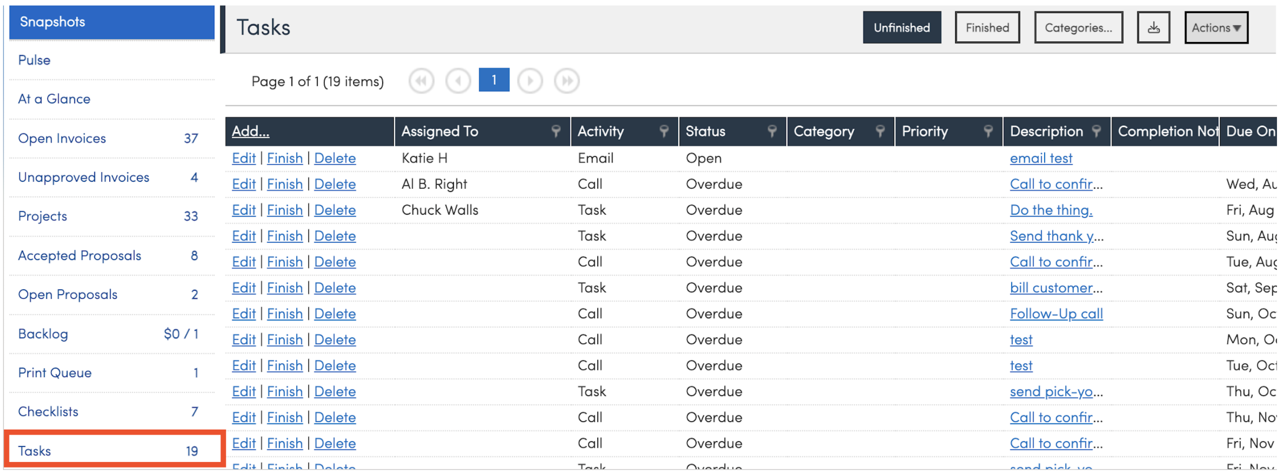
Tasks in ServiceMinder are a powerful way to manage follow-ups, track communications, and stay on top of operational activities across your organization. Whether it's a reminder to call a lead, send a proposal follow-up, or complete an internal action item, Tasks help keep teams aligned and accountable. Users can create Tasks from key areas within the platform and view or complete them via the desktop or mobile app. With categories, user assignments, due dates, and optional reminders, Tasks offer a flexible system for managing day-to-day operations effectively.

This article will reivew:

Settings and Navigation

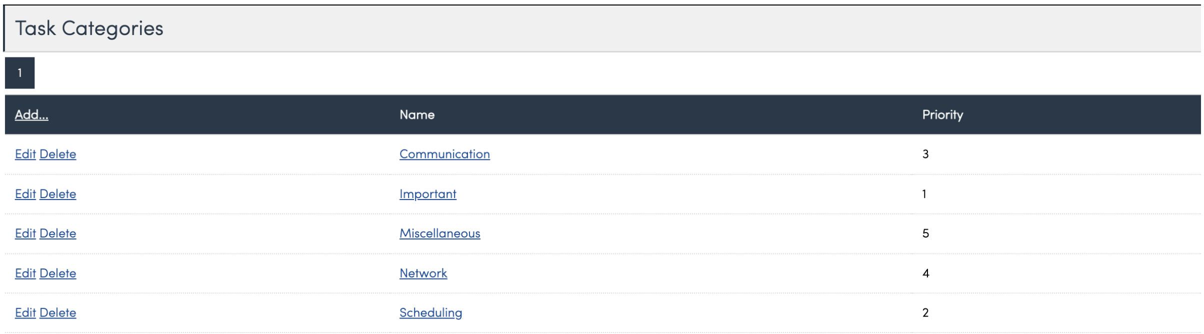
Tasks can be located and reviewed in the **Snapshots** section of the Navigation menu.

- Toggle between **Unfinished** and **Finished** tasks using the buttons at the top of the grid
- Use the **Actions** menu to bulk update or delete tasks
- **Download** a CSV file of tasks using the download button.



Task Categories

Click on the **Categories** button at the top of the grid to add and manage task categories. Task categories can help you keep tasks organized and allow you to assign a priority level to your tasks.



Task Categories

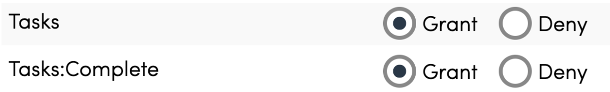
1

Add...	Name	Priority
Edit Delete	Communication	3
Edit Delete	Important	1
Edit Delete	Miscellaneous	5
Edit Delete	Network	4
Edit Delete	Scheduling	2

Required Permissions

There are two user permissions related to **Tasks:**

- **Tasks:Complete -** This permission grants the user access to see Tasks in **My Schedule** and to mark them as complete.
- **Tasks** - This permission grants the user the ability to **create Tasks** as well as access to the **Tasks grid**

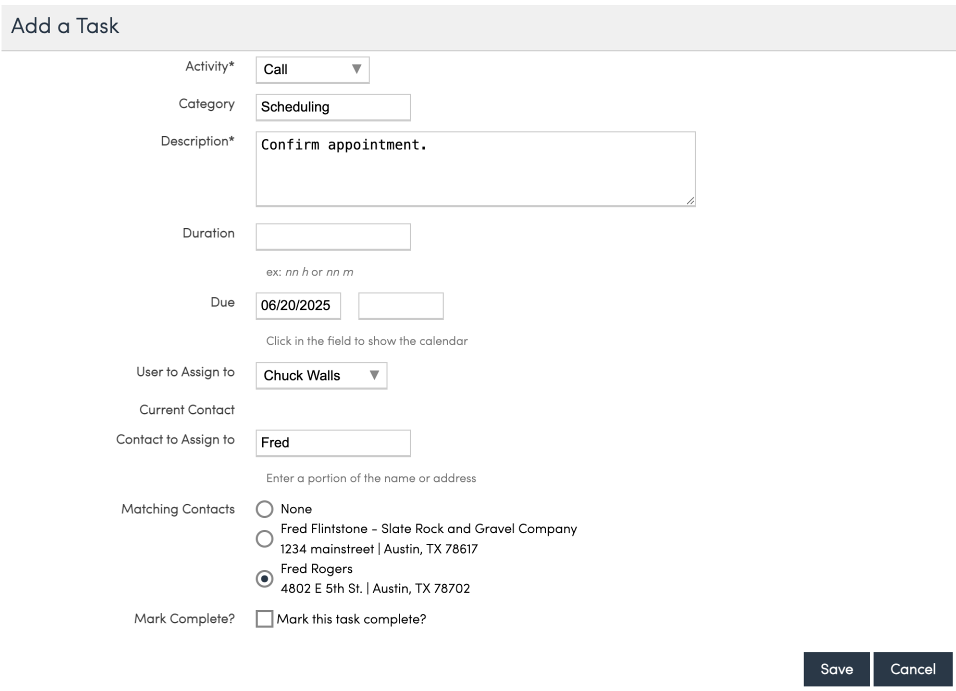


Permissions can be configured via **Control Panel > Users > Edit > Permissions**.

Creating Tasks

Tasks can be created from various places in service**minder**.

- **Contact Details Page:** Click on the **Tasks** tab in the **Additional Details** section.
- **Proposal Details Page:** Click **Add Task** in the blue toolbar towards the bottom of the page.
- **Tasks Grid:** Click **Add** at the top of the grid.



When creating a task, configure the following fields:

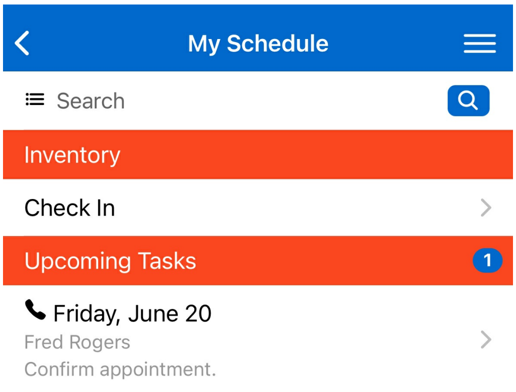
- **Activity:** Choose from the options **call**, **email**, or **task**.
- **Category:** You can create custom categories to better describe the purpose of the task. Use a pre-existing

category or create a new one here.

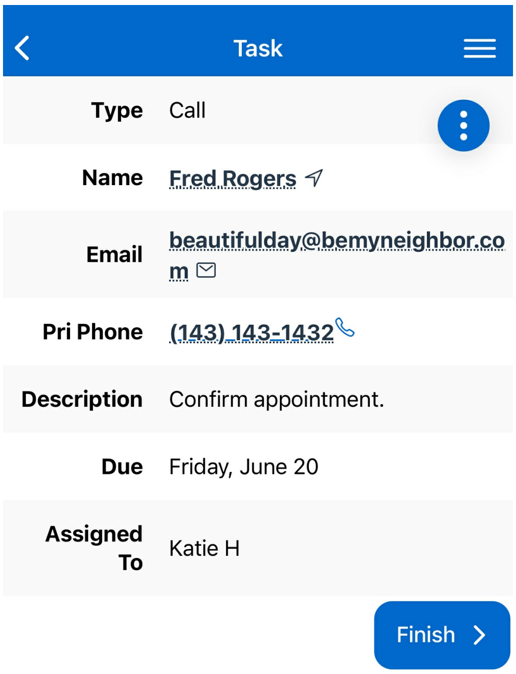
- **Description:** Provide a brief description of the task with any necessary details.
- **Duration:** Determine how long the task should take.
- **Due:** Provide a due date and time.
- **User to Assign to:** Assign the task to a specific user in your organization.
- **Contact to Assign to:** Connect the task to a contact in your organization.
- **Mark Complete:** Mark the task complete immediately (good for creating a paper trail of tasks you've already completed).

Completing Tasks

Users can find their assigned tasks in **My Schedule,** both on the web and the mobile app.



On the task itself, users can review the information about the task. If it is connected to a specific contact, they can also review the basic contact information (name, email, and phone number).



When finishing the task, there is the option to record a **Note** and the option to **Create a Follow-Up Task**, if necessary.

Task Notifications

Users within service**minder** can receive two types of notifications about Tasks:

- **Task Assigned:** When a Task is assigned to them
- **Task Reminder:** Reminders when a Task is almost due

These notifications are available via **email, web banner,** or **mobile app** and can be enabled via **Control Panel > Users > Edit > Notifications** or in the **Personal Notifications** settings page found via the **gear icon** in the top menu.

FAQs

Q: How do I make sure team members get notified when a task is assigned to them?

A: Users will receive notifications when a task is assigned if they have Task Notifications enabled. You can configure this at **Control Panel > Users > Edit > Notifications** or by updating your personal notification preferences using the gear icon in the top menu.

Q: Can tasks be connected to contacts?

A: Yes. Tasks can be linked to specific contacts when they are created. This makes it easy to access related information and provides context for follow-up actions.

Q: What happens when a task is completed?

A: When a user marks a task as complete, they can add a note summarizing what was done and optionally create a follow-up task if further action is needed. Completed tasks are moved to the **Finished** view in the Tasks grid for reference.