THE SimpleStep® GUIDE TO

CREATING A TASK

taxcalc®

TaxCalc can create tasks, which can be allocated to both clients and staff.

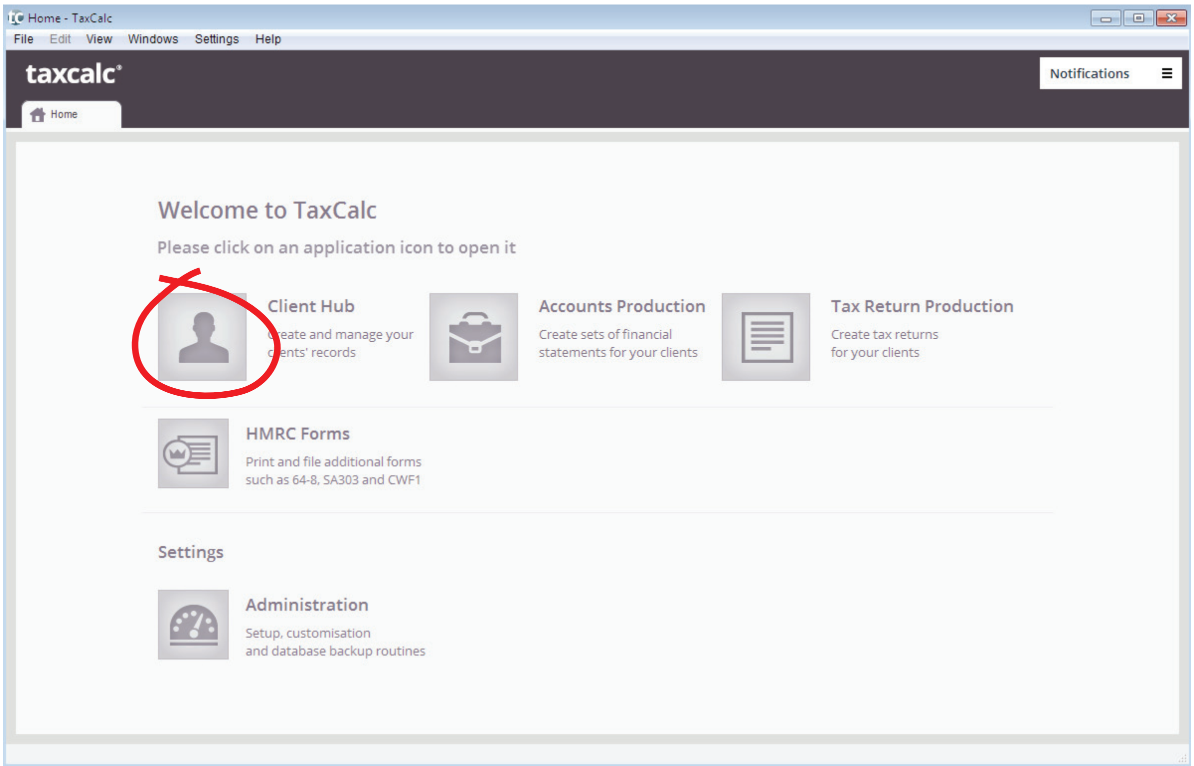
In addition, you may set reminders to alert you regarding a task and also set them to recur.

Once set up, tasks can be viewed collectively and filtered according to type, assignee, creation date and a number of other criteria.

STEP 1 Open the Client Hub Application

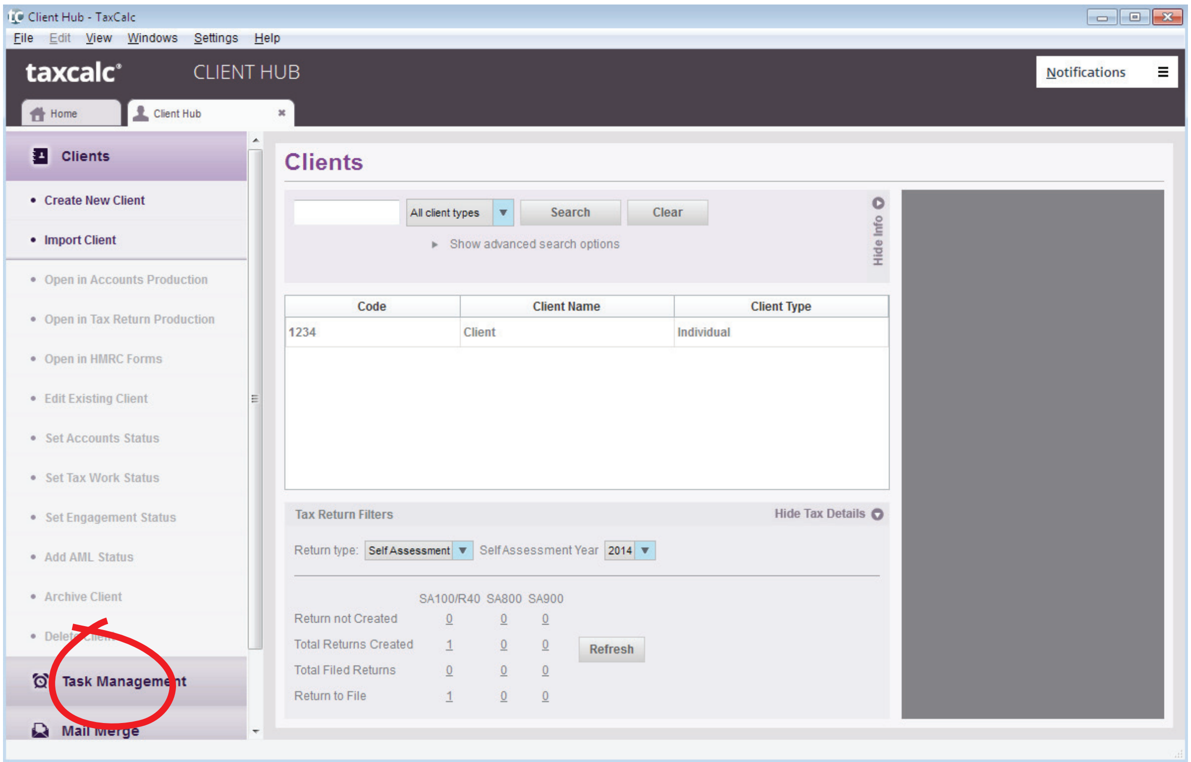
Tasks are managed in the Client Hub application.

When TaxCalc opens, click on Client Hub to open it.

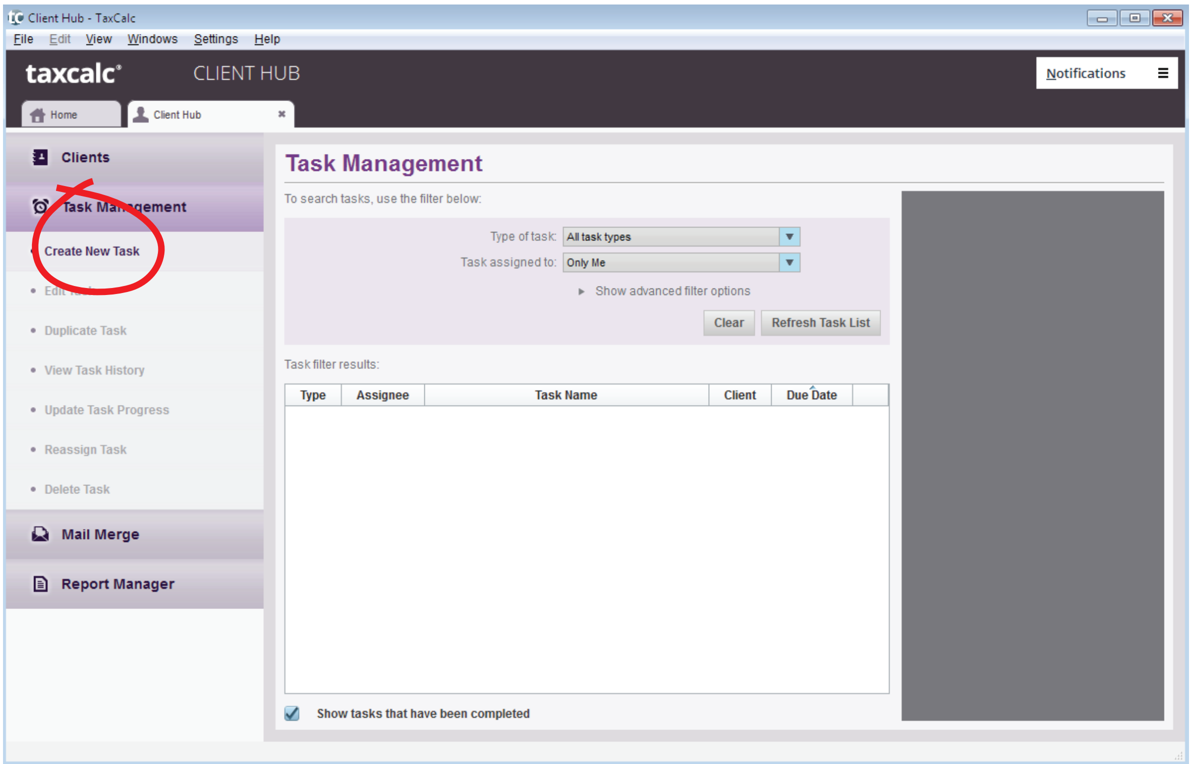


STEP 2 Start the Create New Task Process

When Client Hub opens, it will look similar to the screen below.
To start the Create New Task process, click on the Task Management option in the left-hand menu.



Then click on the Create New Task option that appears underneath Task Management.

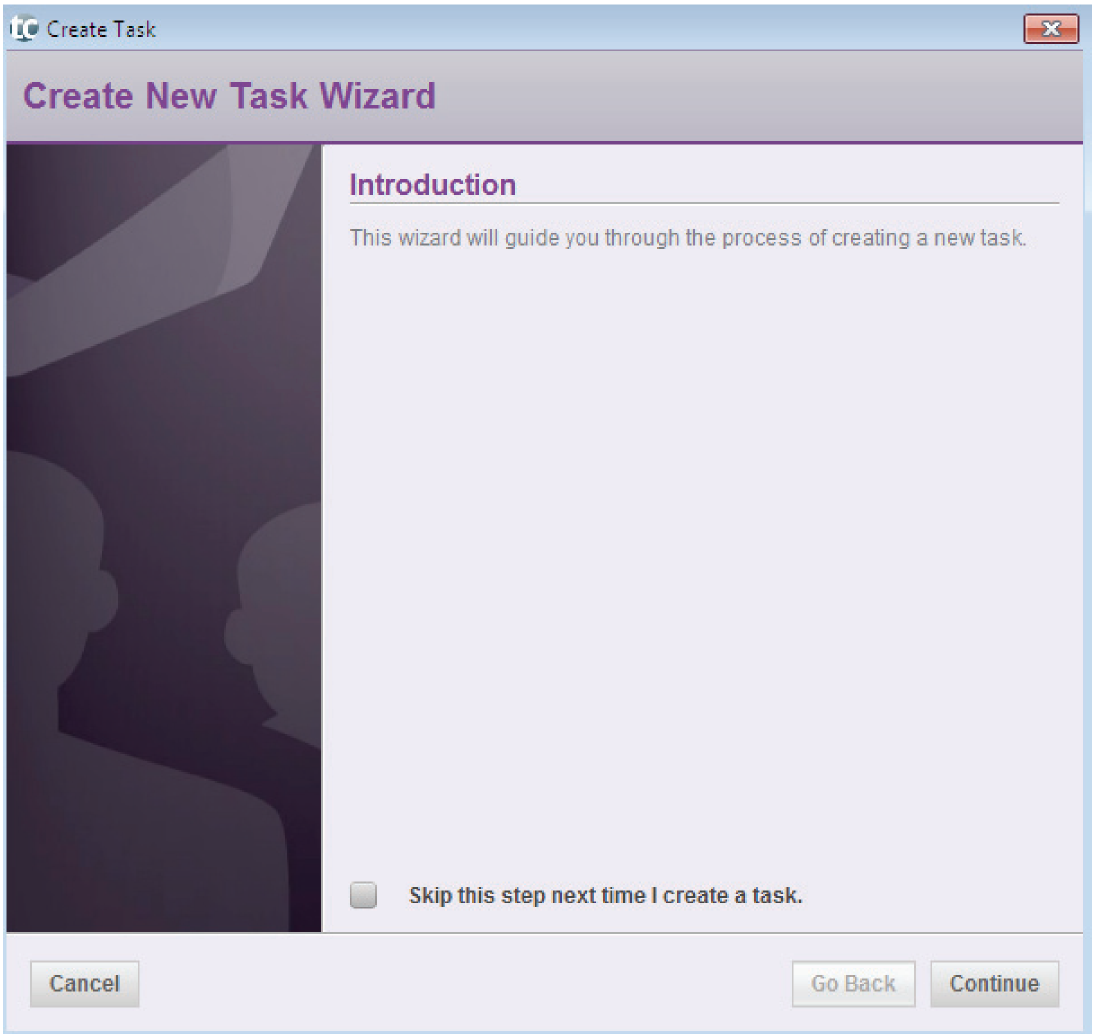


STEP 3

The Create New Task Wizard

Introduction

The Create New Task Wizard will appear.



Throughout TaxCalc, you will find that many processes are driven by Wizards.

At each step, use Continue to advance to the next step and Go Back to return to the previous step.

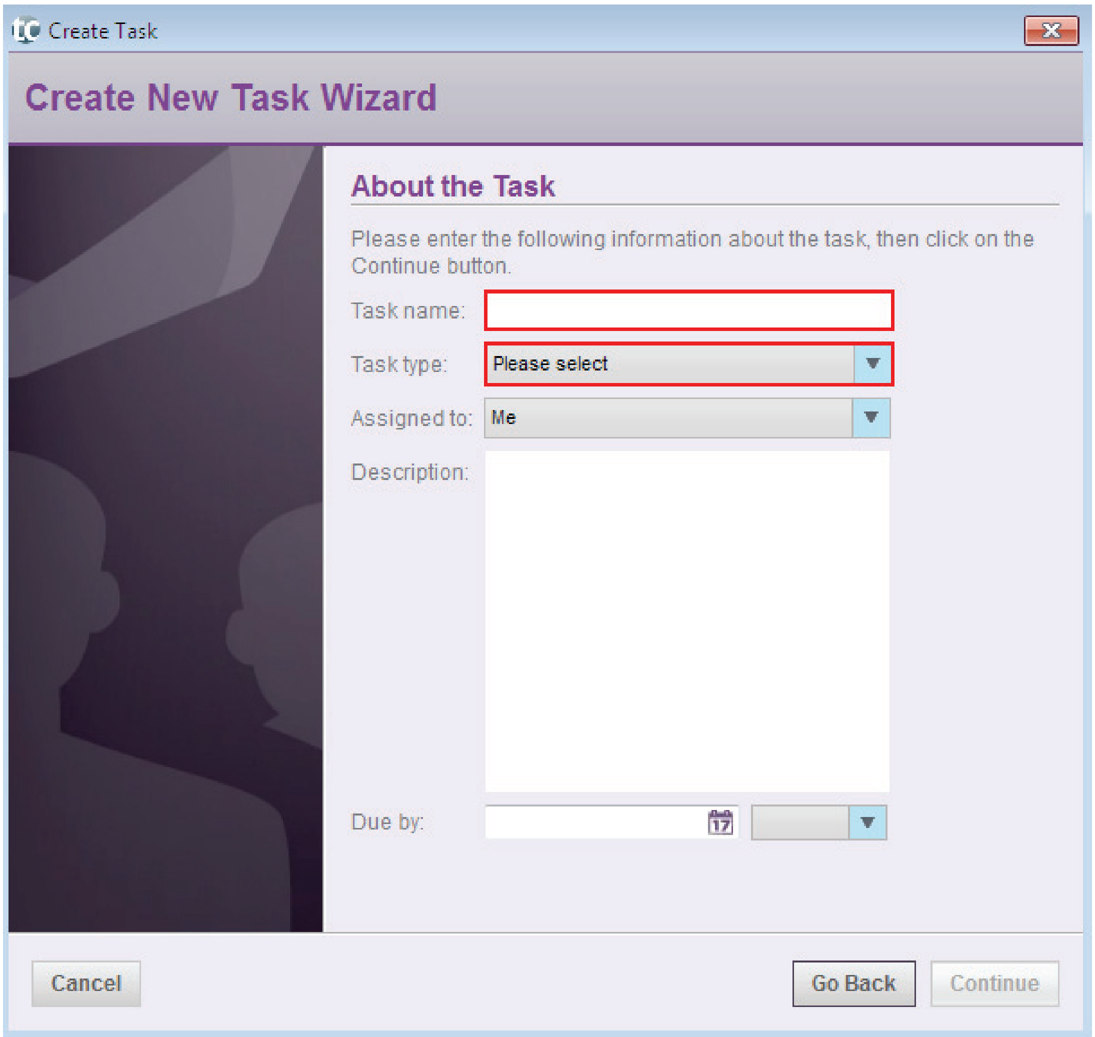
Every time you visit a new Wizard, you will be greeted by an Introduction step. You can tick the checkbox to skip the Introduction the next time you create a task.

Click on Continue to go to the About the Task step.

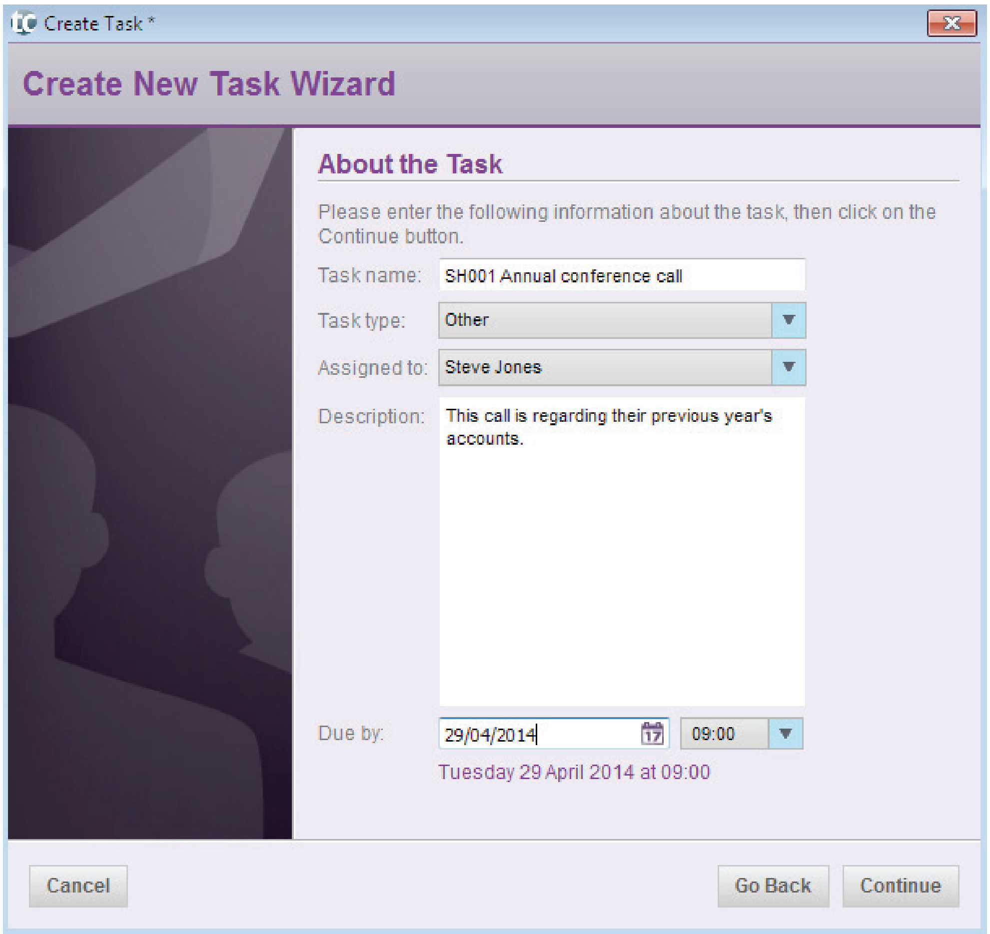
About the Task

The About the Task step is where you determine the task's basic attributes, such as name and description.

Don't worry about mistakes – all tasks are editable throughout the process (simply Go Back to return to this step) and even once created (as long as you have permission to do so).



The fields highlighted in red **must** be completed.

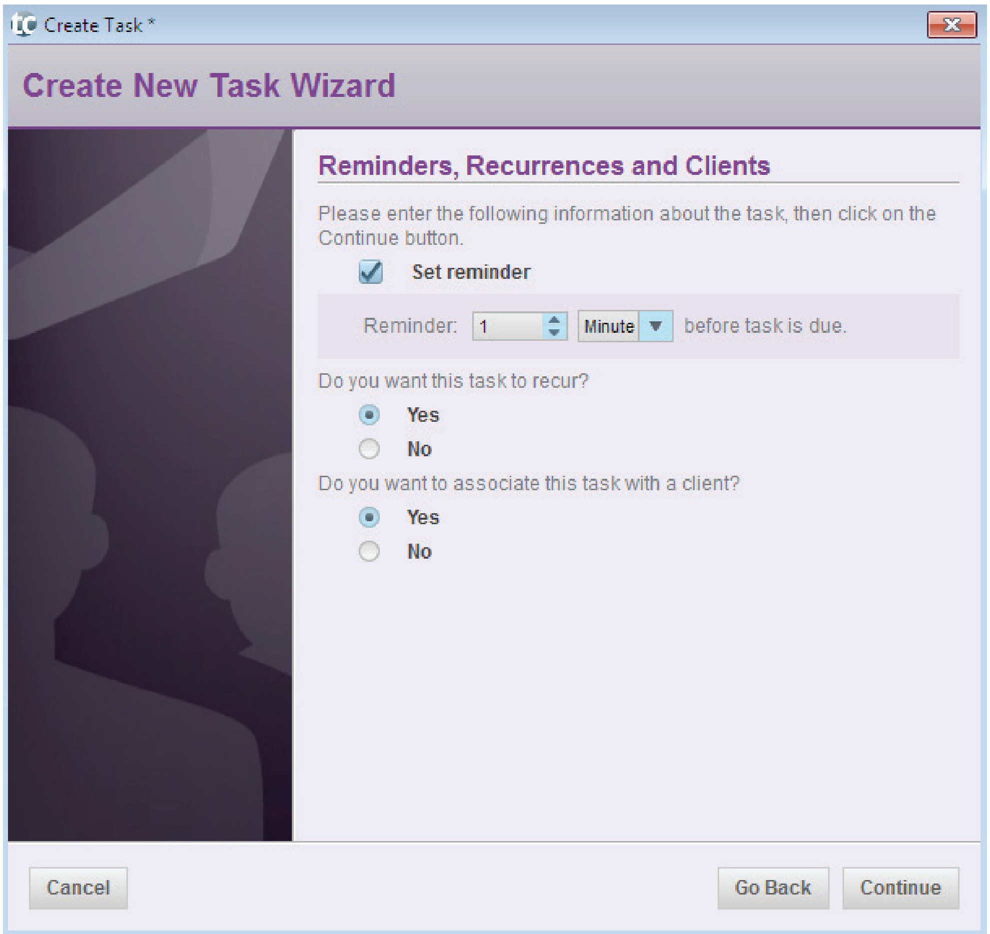


Once you've completed these fields to your satisfaction, click on Continue.

Reminders, Recurrences and Clients

This step is where you decide if a task requires:

- a reminder (TaxCalc will display the reminder to the assignee at the set time)
- recurrence (which will then be specified in a subsequent screen)
- association with a client (which will then be specified in a subsequent screen)

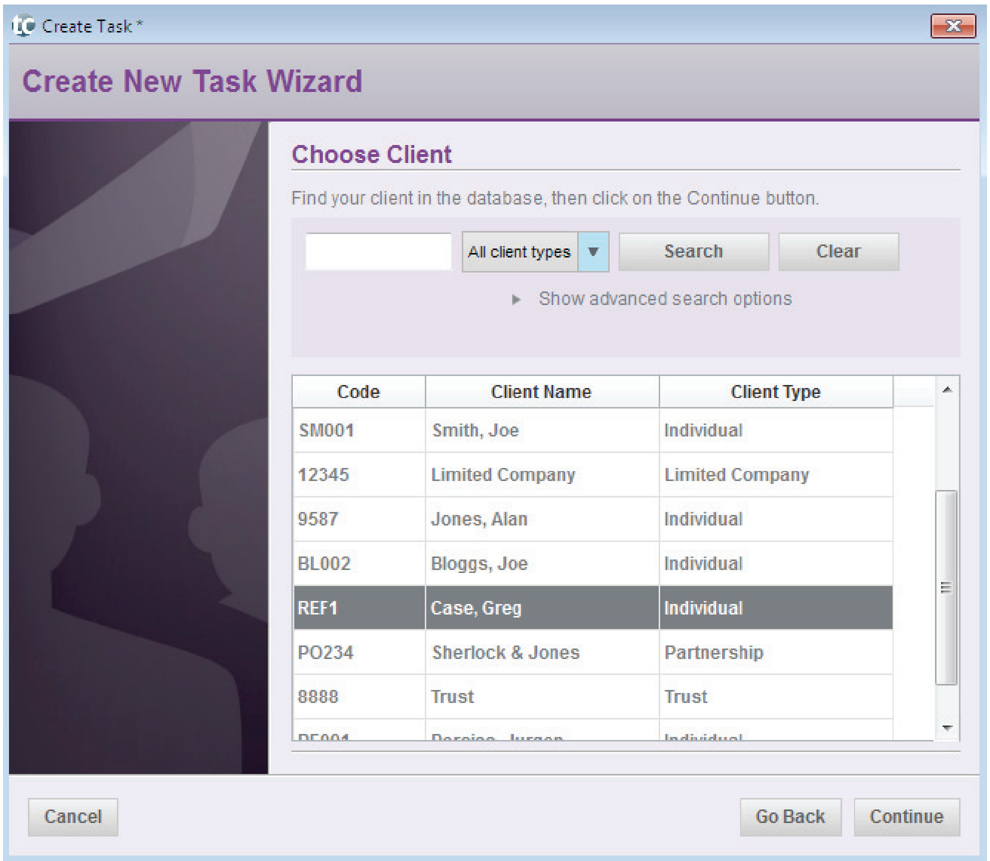


In the example, we will visit all three options: setting a reminder, making the task recur and associating it with a client.

Once you've completed these fields to your satisfaction, click on Continue.

Choose Client

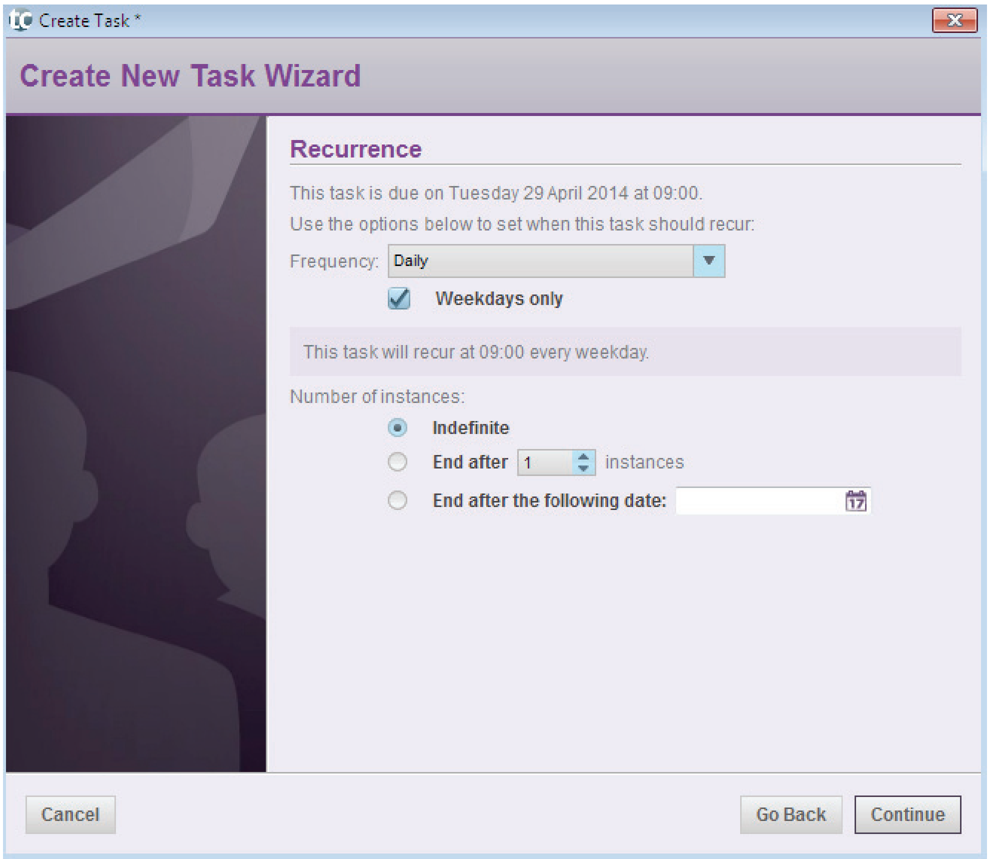
This step will only appear if you decide to associate the task with a client on the preceding Reminders, Recurrences and Clients screen.



Select the relevant client and then click on Continue.

Recurrence

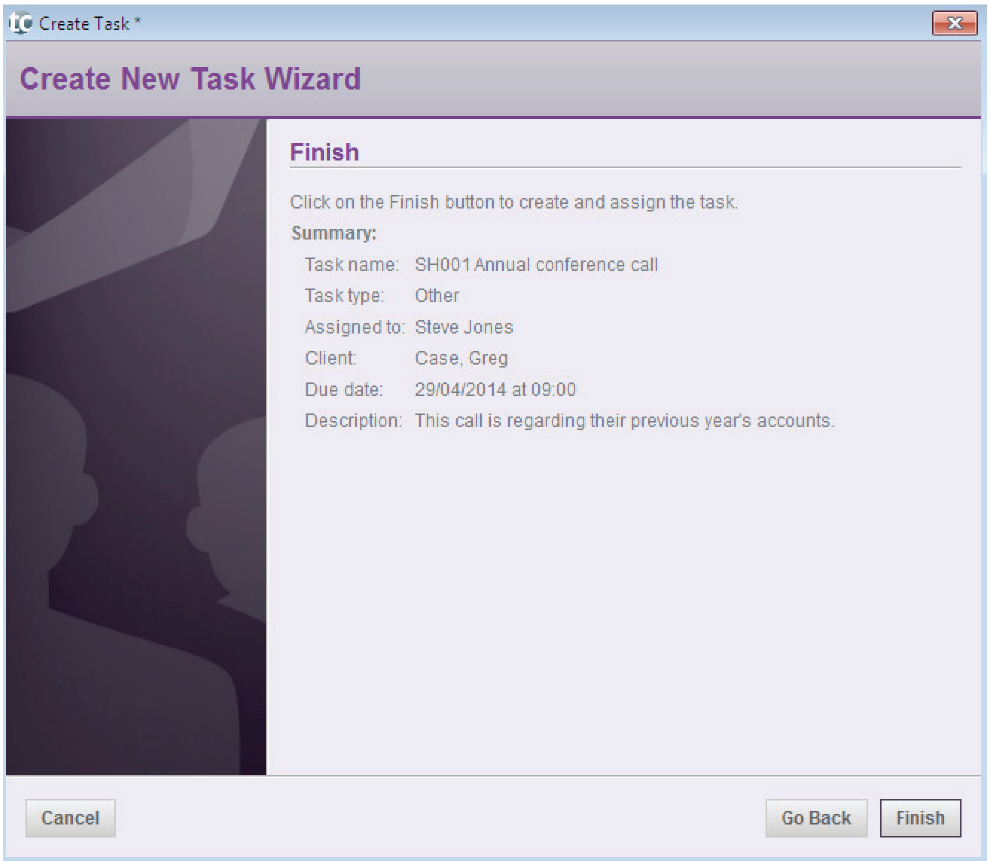
This step will only appear if you decide to have the task recur on the preceding Reminders, Recurrences and Clients screen.



Decide how often and for how long the task should recur and then click on Continue.

Finish

This step summarises all the attributes of the task that you have determined.

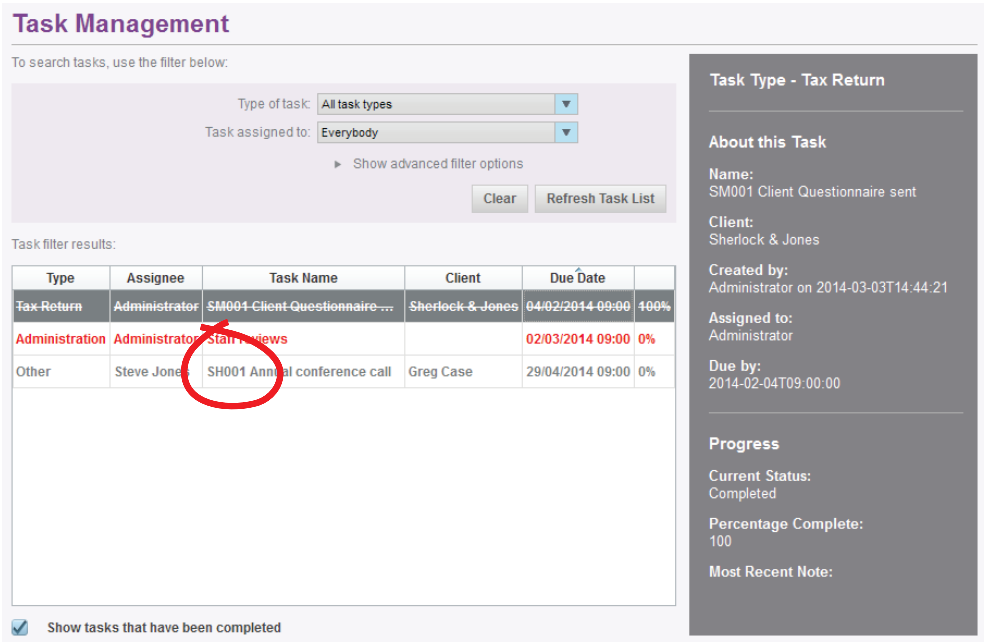


If anything is incorrect, you can click Go Back to revisit the relevant step.

Click on Finish to end the Create Task Wizard and create your task.

STEP 4

The Task Management screen



The task will now appear in the list of tasks on the Task Management screen.

If it does not appear, you can display all tasks by:

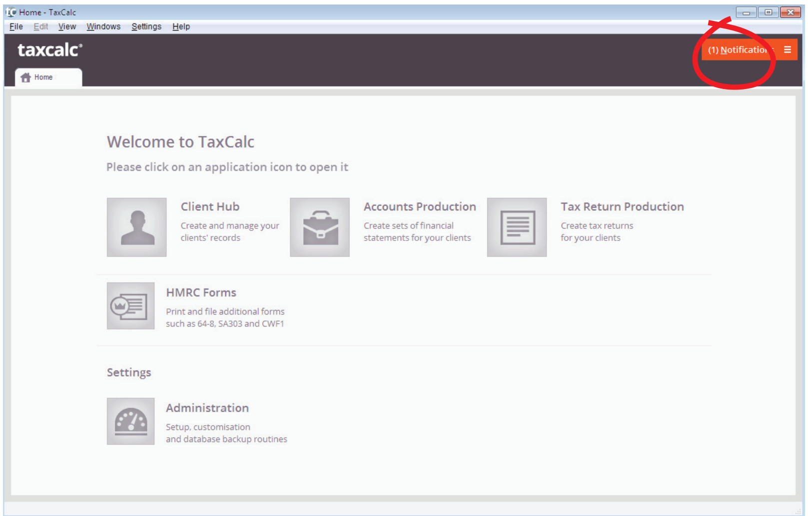
1) Setting the 'Type of task filter' to: All task types
2) Setting the Task assigned to filter to: Everybody
3) Clicking on the Refresh Task List button.

Your task will now appear within the full list.

If it still does not appear, you likely do not have permission to see everybody's tasks in your assigned security profile.

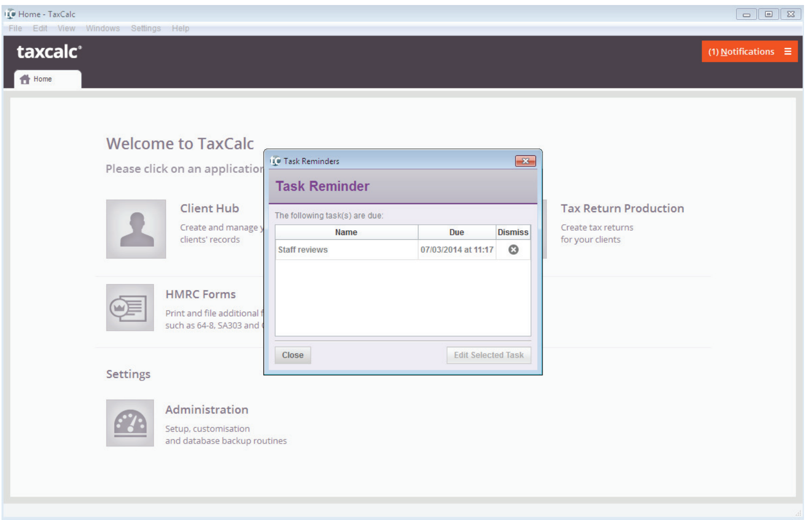
Reminder Notifications

If a task is set with a reminder, the Notification menu will turn red at the set time and will only be displayed to the assignee.



The number displayed in the menu relates to the number of tasks assigned to the user logged in, that have reached their reminder date and time.

If you click on the Notification menu, it will bring up the list of relevant tasks – in other words, all tasks that have reached their set reminder time. Click on Show details to display each task in turn.



Once you have selected a task, you can edit that task (for example, to re-set its reminder time) by clicking on Edit Selected Task.

Should you click on the Dismiss icon for a task, this will remove the reminder entirely (the task will remain however).

Help for all TaxCalc products can be found in our Knowledge Base at **www.taxcalc.com/support**

If you require further assistance please contact our Support Team:
Email: support@taxcalc.com **Phone:** 0845 5190 882